



FleetFocus User Manual

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Prepared for:
**Office of Vehicle Fleet Management
State of Texas**



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This manual provides step-by-step instructions for setting up and using FASuite.

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GUI Interface/General System Operation

Section I

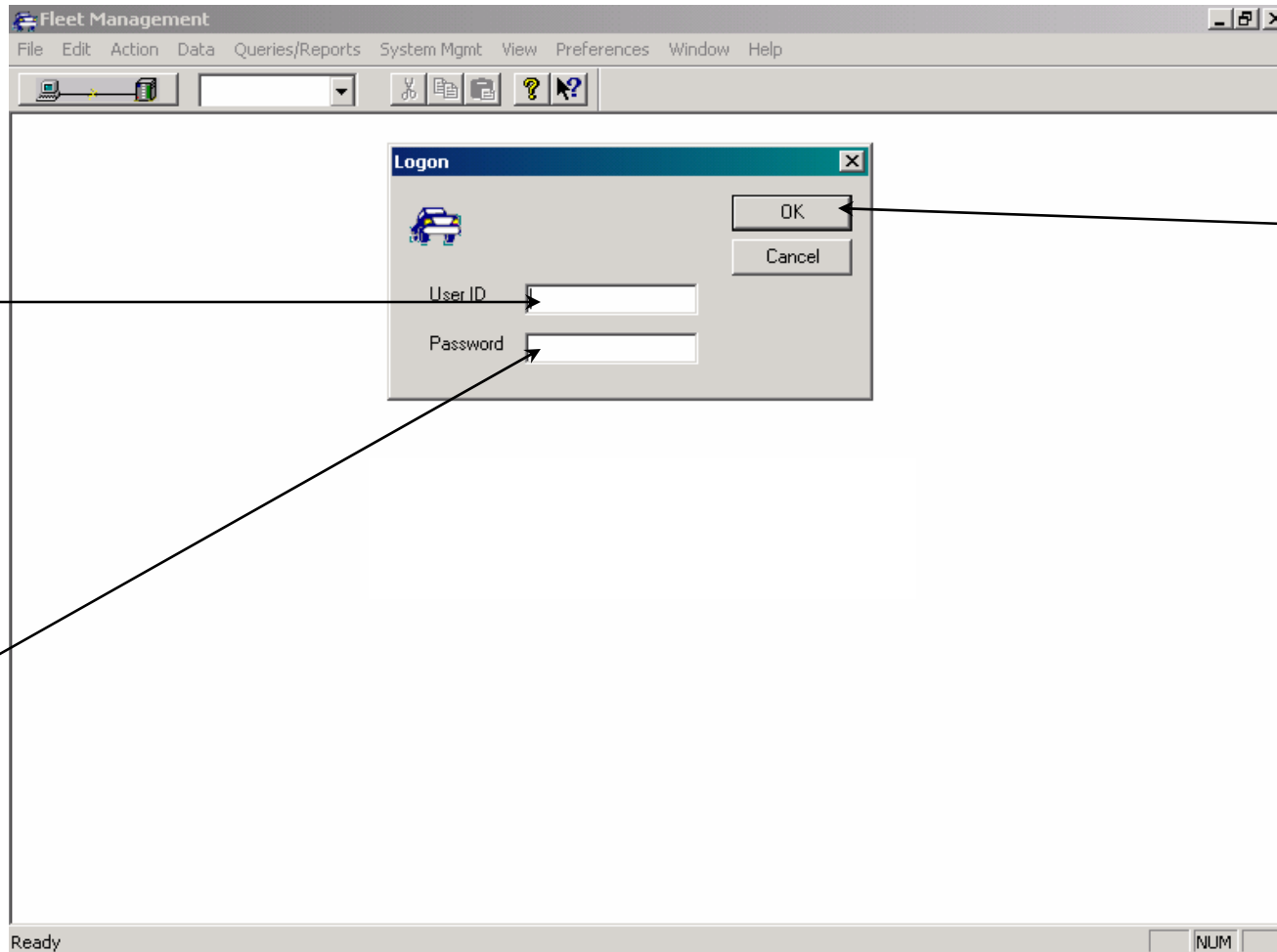


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Logging on to FleetFocus FA



1. Enter your **User ID** here

2. Enter your **Password** here

3. Click **OK** to log on



Changing your FleetFocus FA Password

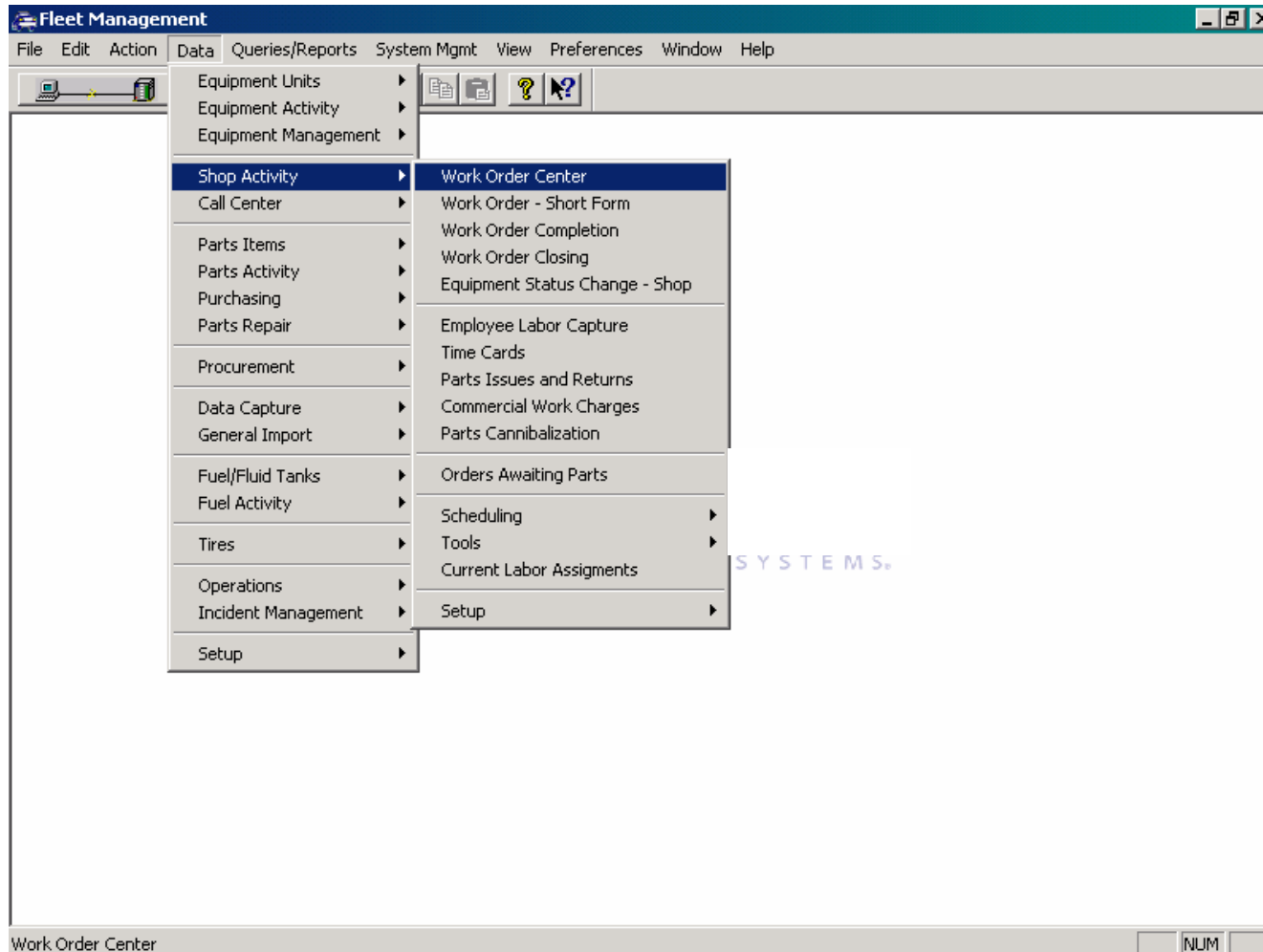
System Management → Setup → Access Rights → Change Password

The screenshot shows the 'Fleet Management - [Change Password]' window. It has a menu bar (File, Edit, Action, Data, Queries/Reports, System Mgmt, View, Preferences, Window, Help) and a toolbar. Below the toolbar is a 'Row' section. The main area contains a 'Change Password' tab and a 'More Info' tab. The 'Change Password' tab has a 'Change and verify password' section with three input fields: 'Old password', 'New password', and 'Verify'. The 'Verify' field is disabled. The 'More Info' tab is active, showing a large empty area. The status bar at the bottom shows 'Ready' and 'Rec: ___ of ___'.

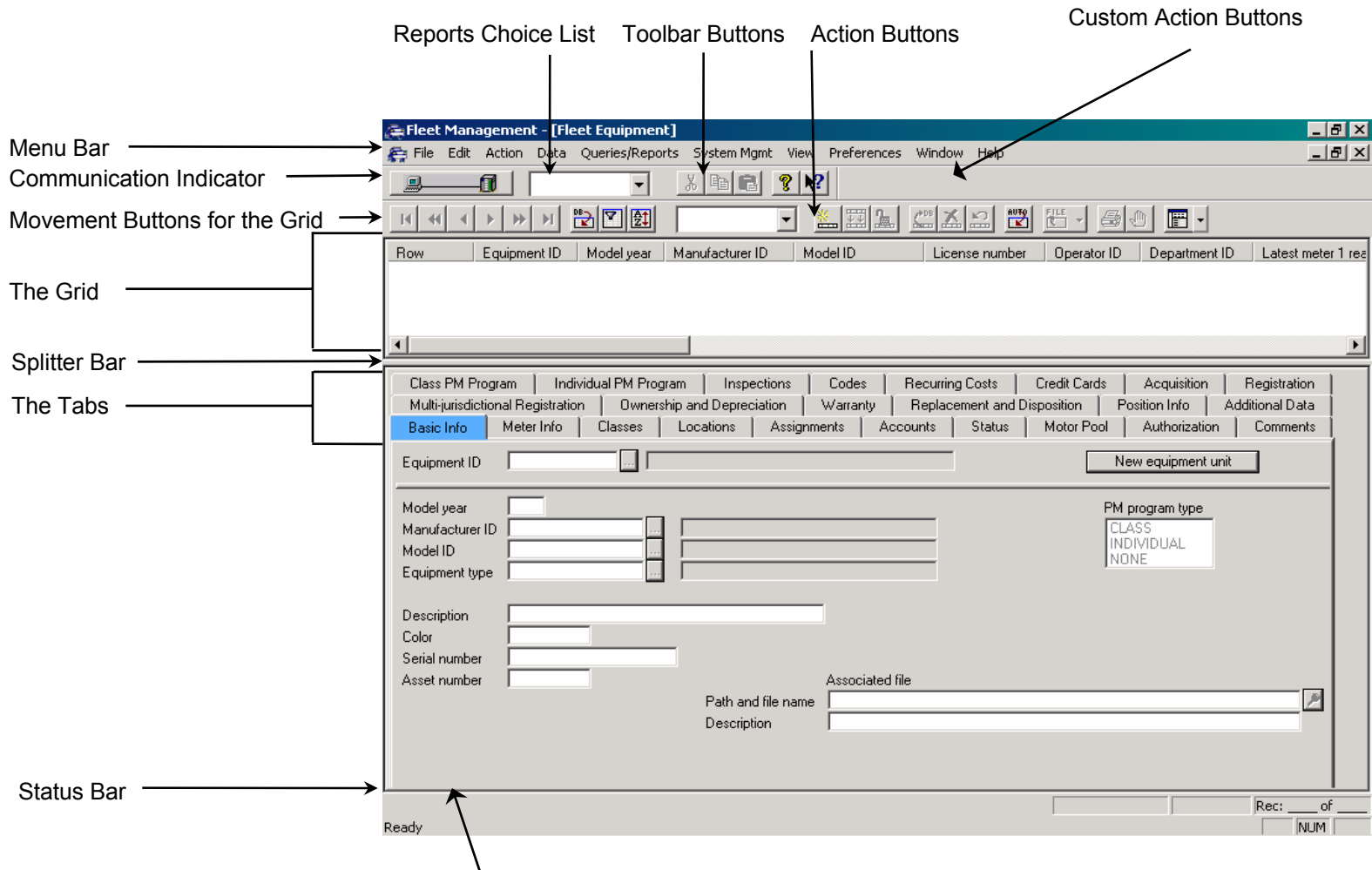
1. Click here to **Prepare for insert.** (Arrow pointing to the 'Prepare for insert' button in the toolbar)
2. Type your **Old password.** (Arrow pointing to the 'Old password' input field)
3. Type your **New password.** (Arrow pointing to the 'New password' input field)
4. Type your new password again to **Verify** it. (Arrow pointing to the 'Verify' input field)
5. Click here to **process.** (Arrow pointing to the 'Process' button in the toolbar)

Example of Using the FleetFocus FA Menus

Data → *Shop Activity* → *Work Order Center*



Graphical User Interface (GUI)



Look here for successful processing or error messages!

Action Buttons *(and Useful Keyboard Shortcuts!)*



Get Data

(Ctrl + G)

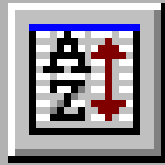
**Unrestricted
Get Data**



Filter

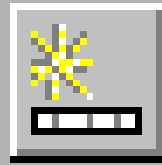
(Ctrl + F)

**Restricted
Get Data**



Define Sort

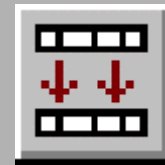
(Ctrl + O)



**Prepare for
Insert**

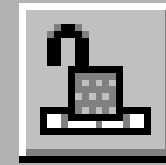
(Ctrl + N)

Star for Start



**Prepare for
Copy**

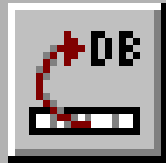
(Ctrl + Y)



**Prepare for
Update**

(Ctrl + U)

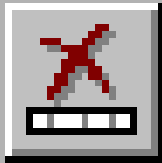
Unlock



Process

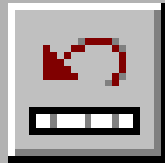
(Ctrl + S)

Save



Delete

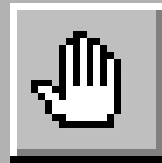
(Ctrl + D)



Cancel

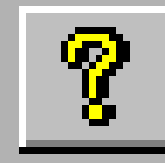
(Ctrl + Z)

Undo

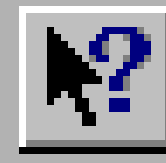


Stop

**Stop Data
Retrieval**



About



Help Context

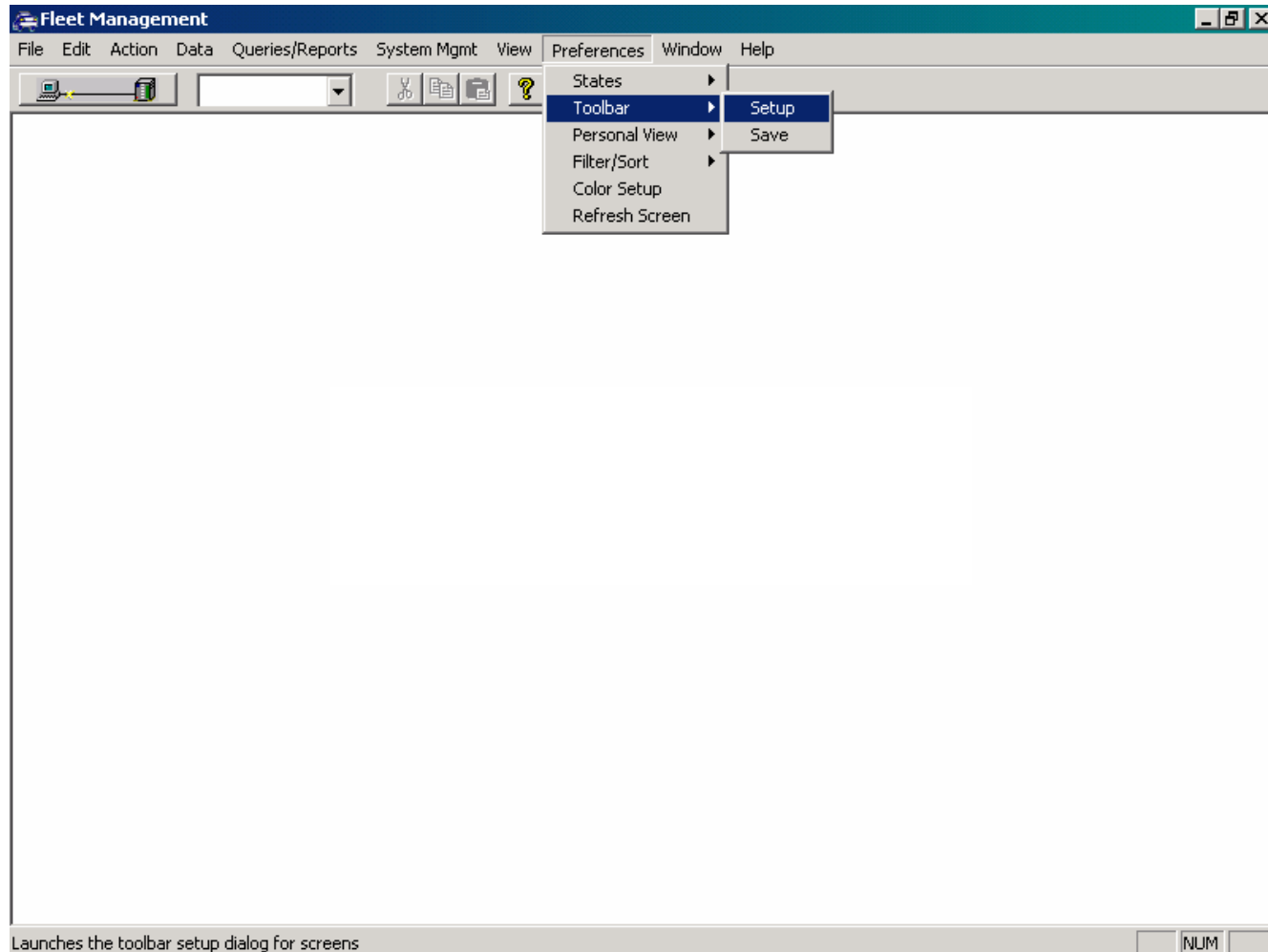
(F1)

**Screen Specific
On-line Help**



Creating Toolbar Buttons

Preferences → Toolbar → Setup



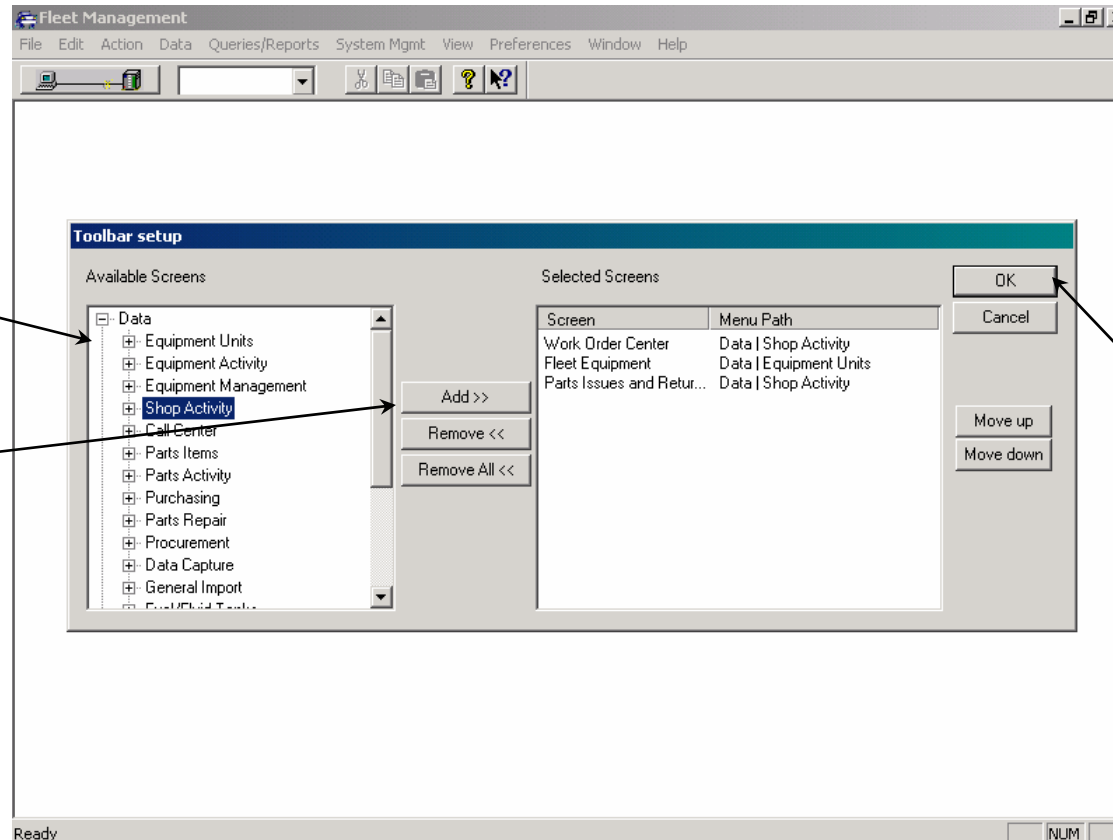
Creating Toolbar Buttons

Preferences → Toolbar → Setup

1. Navigate to screen

2. Click **Add**

3. Repeat for each screen you want to create a button for.



4. Click here to process.

5. When all toolbar buttons are the way you want them, go to *Preferences → Toolbar → Save* to save your changes!

Using the Keyboard on the Posting Screens

You can use the keyboard commands and shortcuts to make the data entry easier!

Remember to use the keyboard shortcuts for the Action Buttons too!

- **Ctrl + F** for the **Filter**
- **Ctrl + N** for **Prepare for Insert**
- **Ctrl + U** for **Prepare for Update** (Unlock)
- **Ctrl + S** for **Process** (Save)
- **Ctrl + Z** for **Cancel**
- **Ctrl + [SPACE]** to move into the group fields

Press **Alt + →** to move from tab to tab on a screen

Press **Ctrl + B** to remove an entire line of data **BEFORE** you process (you cannot remove or change the line of data **AFTER** you process)

F4 shows you the Choice Lists.

Use the **SPACE BAR** to mark and unmark checkboxes

Use the **TAB** key to move forward through these columns or fields.

Use **SHIFT-TAB** to move backward through these columns or fields.

Use **Shift + ' (Shift + Quote)** to copy the value in the field above. For example, you can use this shortcut when entering multiple lines of labor data and need to enter the same **Employee ID** on all lines.

FleetFocus FA GUI Basics - Filter

On any screen, use the **Filter** button to look up data that is already in the system. Clicking this button brings up a “request form” that you fill out in order to limit the data displayed.



Fleet Equipment screen
List of equipment units with Equipment ID 103

Filter

Get Data Close Clear Cancel

Equipment ID 103
Model year
Manufacturer ID
Model ID
Equipment type
Serial number
Asset number
Meter types class
Maintenance class
PM program class
Standards class
Rental rates class
Resources class
SLA equipment category
Stored location ID
Assigned PM location ID
Assigned repair location ID
Station location ID
Operator ID
Operator name
Department ID
Company ID
Account ID

Fleet Equipment screen
List of Ford equipment units assigned to Repair location 01

Filter

Get Data Close Clear Cancel

Equipment ID
Model year
Manufacturer ID FORD
Model ID
Equipment type
Serial number
Asset number
Meter types class
Maintenance class
PM program class
Standards class
Rental rates class
Resources class
SLA equipment category
Stored location ID
Assigned PM location ID
Assigned repair location ID 01
Station location ID
Operator ID
Operator name
Department ID
Company ID
Account ID

Work Order Center screen
Open repair orders at Repair location 01

Filter

Get Data Close Clear Cancel

Work order location ID 01
Work order year
Work order number
Job status OPEN
Current work delay ID
From open date
To open date
Job type REPAIR
Equipment ID
Service status
Priority ID
Tech/vendor
Repair reason ID
Work class
Warranty work UNKNOWN
Date and time opened
Date and time closed
License number
Department ID
Reference order ID
User ID order opened by
Multi-unit project ID
Include messages for associated components


In any filter dialog box, click the Get Data button to fill the grid with matching data

FleetFocus FA GUI Basics - Filter (*continued*)

Choice Lists and Wildcards


Choice Lists

Click the button at the right of the field to display a list of valid choices.

Manufacturer ID 

--	NOT ASSIGNED
ADVAN	ADVANCE
ALLIS	ALLIS CHALMERS
AMERL	AMERICAN LINCOLN
ANTHO	ANTHONY
BAKER	BAKER
BTLIF	B. T. LIFT ELECTRIC HANDJACK
BUICK	BUICK
CAPAC	CAPACITY
CATER	CATERPILLAR

Enter starting value(s) to limit the choice list.

Manufacturer ID 

FIBER	FIBER CORP.
FORDX	FORD MOTOR COMPANY
FRGHT	FREIGHTLINER CORP
FRUHF	FRUEHAUF TRAILER COMPANY

Wildcards: % and _

% = “anything”

All equipment IDs starting with F00:

Equipment ID 

All equipment with asset numbers ending with 01:


Asset number

All equipment with serial numbers containing 1X05:

Serial number

_ = “any single character”

All equipment with 4-character repair locations starting with 503:

Assigned repair location 

All equipment with 5-character maintenance classes starting with 83 and ending with 06:

Maintenance class 

Saving Filters and Sorts

Preferences → Filter/Sort → Save Current

1. On Any screen, use the filter and sort buttons to display the data how you would like to see it

2. Navigate to the path listed above and choose:

Save Current

Row	Equipment ID	Model year	Manufacturer ID	Model	Department ID	Latest meter 1 read
1	S123987	2001	FORD	ESCORT	DEPT1	125
2	S934847	2001	FORD	ESCORT	DEPT1	87
3	S987564	2001	FORD	ESCORT	DEPT1	35

3. Enter a **Name** for the saved Filter/Sort

4. Click **OK**

Please enter a name for this entry:

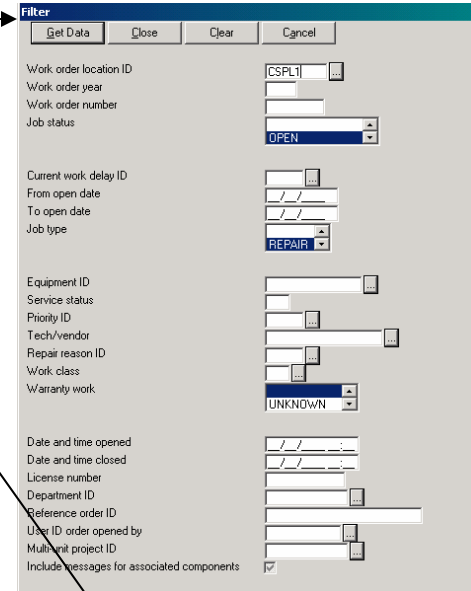
Name:

Export Data Features

The Export Data button on the Tool bar provides the ability to export the information in the Grid.

Steps to using the Export Data button are:

1. Use the Filter to select the data you desire to export.
2. Click the down arrow on the **Data Export Button** and select the destination where you want the data sent. You can choose the **clipboard** or **file** option. Also, you can choose to export the data as delimited or fixed length.
3. After you select the destination, re-click the **Export Data Button** and the data is exported to your destination. If you selected the file option, an Export Data Save box will open, and you can select the file path.
4. The file you save may be opened in other applications. If you selected the clipboard destination, you can Paste the file in to applications that support the cut/copy/paste functions.



Filter

Get Data Close Clear Cancel

Work order location ID CSPL1

Work order year

Work order number

Job status OPEN

Current work delay ID

From open date

To open date

Job type REPAIR

Equipment ID

Service status

Priority ID

Tech/vendor

Repair reason ID

Work class

Warranty work UNKNOWN

Date and time opened

Date and time closed

License number

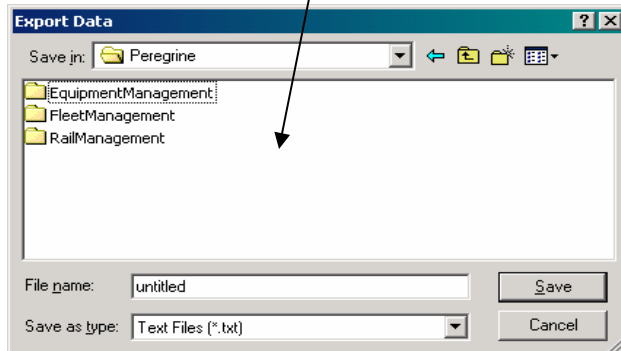
Department ID

Reference order ID

User ID order opened by

Multi-unit project ID

Include messages for associated components



Export Data

Save in: Peregrine

EquipmentManagement

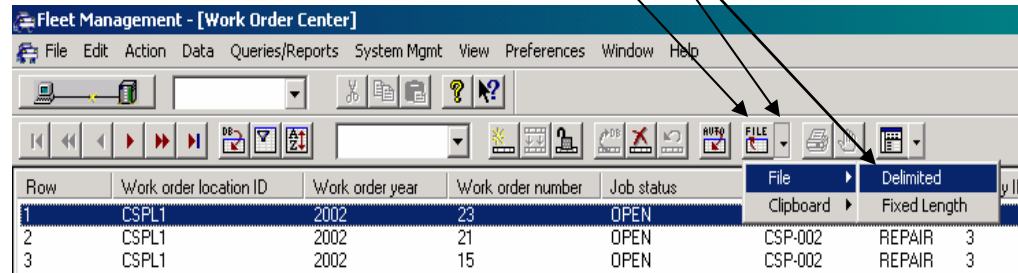
FleetManagement

RailManagement

File name: untitled

Save as type: Text Files (*.txt)

Save Cancel



Fleet Management - [Work Order Center]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Row	Work order location ID	Work order year	Work order number	Job status			
1	CSPL1	2002	23	OPEN			
2	CSPL1	2002	21	OPEN	CSP-002	REPAIR	3
3	CSPL1	2002	15	OPEN	CSP-002	REPAIR	3

File Delimited

Clipboard Fixed Length

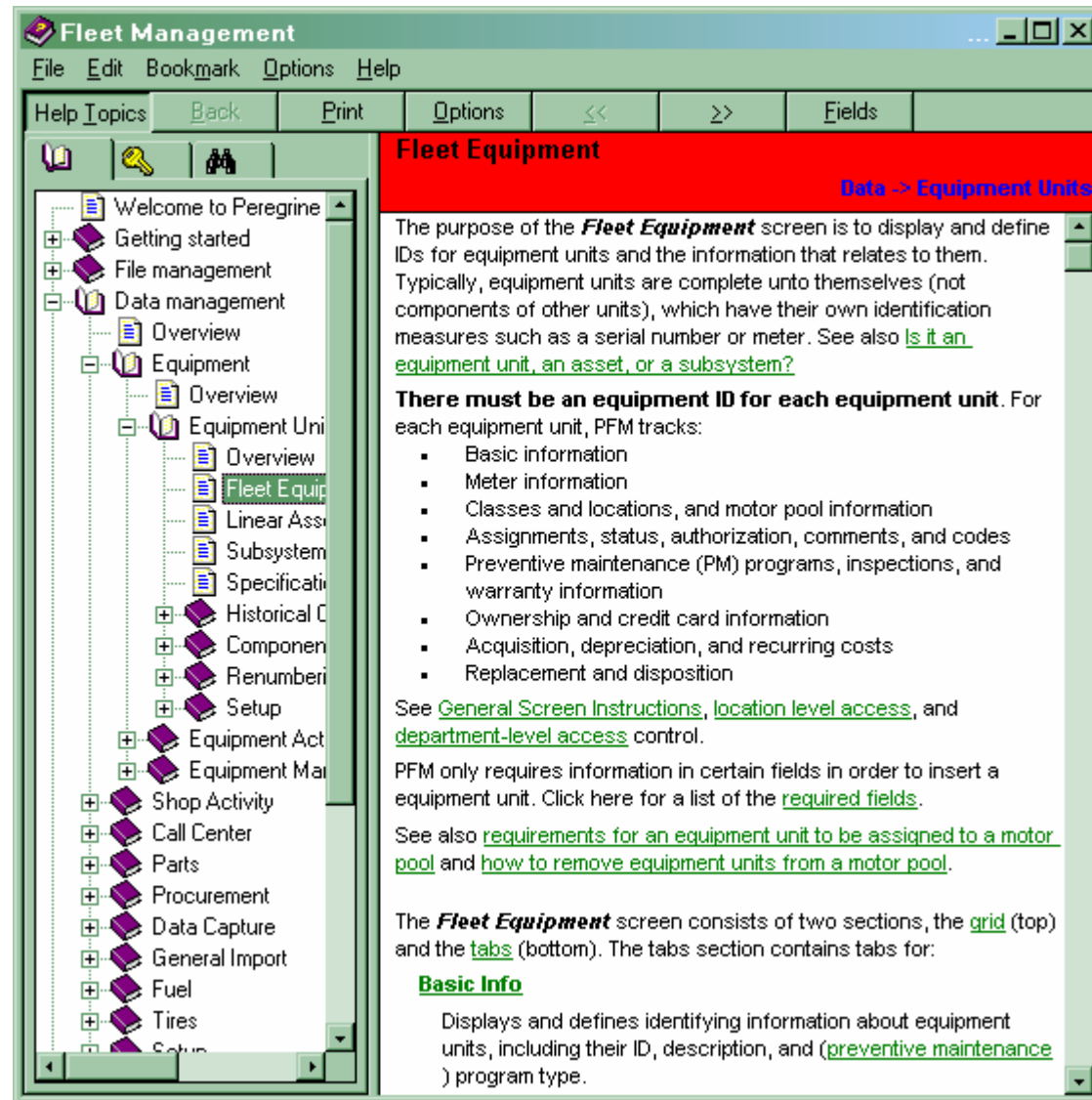
Using FleetFocus FA Online Help

Help → Contents

FleetFocus FA includes a modern online Help facility which offers:

- Quick lookup tools for explanations of a single item on a screen
- Instructions for how to accomplish tasks
- Comprehensive descriptions of what FleetFocus FA does when it processes entries and generates displays
- A full set of hypertext links, which makes it easy to move from one Help topic to another

Remember that **F1** is the shortcut to open the online Help system!

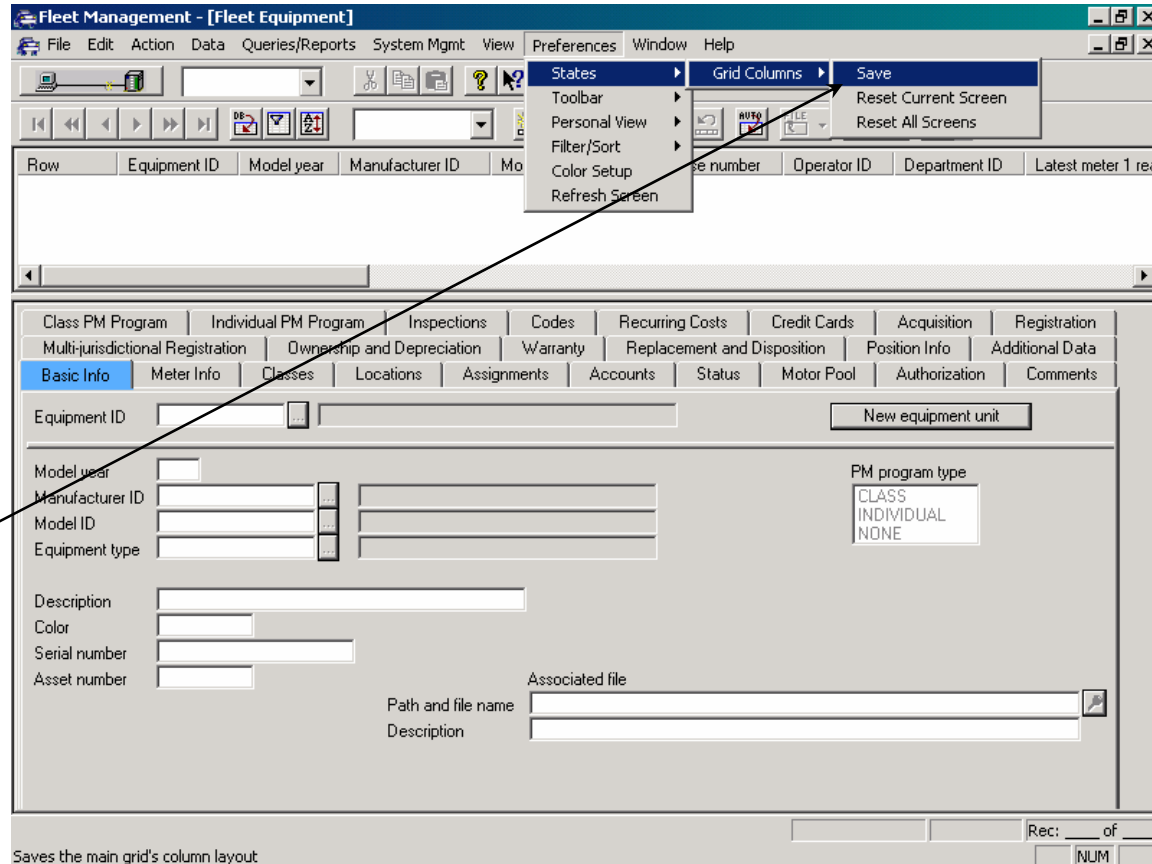


Saving Grid Columns

Preferences → States → Grid Columns → Save

1. On Any screen, drag the grid columns to be in the order you wish to see the data

2. Navigate to the path listed above and choose **Save** to save your settings.



The screenshot shows the 'Fleet Management - [Fleet Equipment]' application window. The menu bar includes File, Edit, Action, Data, Queries/Reports, System Mgmt, View, Preferences, Window, and Help. The 'Preferences' menu is open, showing a list of options: States, Toolbar, Personal View, Filter/Sort, Color Setup, and Refresh Screen. The 'States' menu is further open, showing 'Grid Columns' and 'Save'. The 'Grid Columns' menu is also open, showing 'Save', 'Reset Current Screen', and 'Reset All Screens'. The 'Save' option is highlighted. The main window displays a grid with columns: Row, Equipment ID, Model year, Manufacturer ID, Mo, se number, Operator ID, Department ID, and Latest meter 1. Below the grid, there are tabs for various settings: Class PM Program, Individual PM Program, Inspections, Codes, Recurring Costs, Credit Cards, Acquisition, Registration, Multi-jurisdictional Registration, Ownership and Depreciation, Warranty, Replacement and Disposition, Position Info, and Additional Data. The 'Basic Info' tab is selected, showing fields for Equipment ID, Model year, Manufacturer ID, Model ID, Equipment type, Description, Color, Serial number, Asset number, and a 'New equipment unit' button. The 'PM program type' dropdown is set to 'NONE'. The 'Associated file' section includes fields for Path and file name and Description. The status bar at the bottom indicates 'Saves the main grid's column layout' and 'Rec: ___ of ___'.



Primary Vehicle Information

Section II



Section II Contents

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Fleet Equipment

Data → Equipment Units → Fleet Equipment

FleetFocus - [Fleet Equipment]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Row Equipment ID Model year Manufacturer ID Model ID License number Operator ID Department ID Latest meter 1 reading Latest meter 2 reading Equip

Class PM Program Individual PM Program Inspections Codes Recurring Costs Credit Cards Acquisition Registration
Multi-jurisdictional Ownership/Depreciation Warranty Replacement/Disposition Position Info Additional Data Relationships

Basic Info Meter Info Classes Locations Assignments Accounts Status Motor Pool Authorization Comments

Equipment ID

Model year PM program type
CLASS
INDIVIDUAL
NONE

Manufacturer ID

Model ID

Equipment type

Description

Color

Serial number

Asset number

Associated file
Path and file name
Description

Ready Rec: ___ of ___



Fleet Equipment – Basic Info

Data → Equipment Units → Fleet Equipment (Basic Info tab)

Highlighted fields are required upon insert.

- Equipment ID
- Model year
- Manufacturer ID
- Model ID
- Equipment type
- Description

The screenshot shows the FleetFocus - [Fleet Equipment] application window. The menu bar includes File, Edit, Action, Data, Queries/Reports, System Mgmt, View, Preferences, Window, and Help. The toolbar contains various icons for file operations and data management. The main window displays the Basic Info tab, which is highlighted in blue. Other tabs include Class PM Program, Individual PM Program, Inspections, Codes, Recurring Costs, Credit Cards, Acquisition, Registration, Multi-jurisdictional, Ownership/Depreciation, Warranty, Replacement/Disposition, Position Info, Additional Data, Relationships, Meter Info, Classes, Locations, Assignments, Accounts, Status, Motor Pool, Authorization, and Comments. The Basic Info tab contains the following fields:

- Equipment ID: A text field with a dropdown arrow, highlighted in yellow.
- Model year: A text field, highlighted in yellow.
- Manufacturer ID: A text field with a dropdown arrow, highlighted in yellow.
- Model ID: A text field with a dropdown arrow, highlighted in yellow.
- Equipment type: A text field with a dropdown arrow, highlighted in yellow.
- Description: A text field, highlighted in yellow.
- Color: A text field.
- Serial number: A text field.
- Asset number: A text field.
- Associated file: A section with two sub-fields: Path and file name, and Description, both with text input fields.
- PM program type: A dropdown menu with options CLASS, INDIVIDUAL, and NONE.
- New equipment unit: A button.

The status bar at the bottom shows "Ready" and "Rec: ____ of ____".



Fleet Equipment – Basic Info

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Equipment ID	Agency Number	Three-digit state agency number as defined by the Texas Comptroller of Public Accounts. Enter as the first three digits of the Equipment ID
Equipment ID	Primary Location	Up to three digit location code for the facility, region, district, or section to which the vehicle is assigned. Enter as the fourth through sixth digits of the equipment ID. Enter as '000' if no location code is assigned.
Year	Year	Year in which vehicle was manufactured. Enter year as a four digit number.
Manufacturer	Make/Manufacturer	Vehicle manufacturer. Select manufacturer's name from choice list provided. Field will display only the first four letters of the manufacturer's name.
Model	Model	Vehicle model. Select model name from choice list provided.
Serial Number	Vehicle Identification Number (VIN)	Vehicle identification number as defined by the manufacturer. VIN should be provided in the vehicle's purchase materials and marked on the vehicle.



Fleet Equipment – Basic Info

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Asset Number	SPA Number	State Property Accounting number. If you do not have access to SPA, you agency's property manager can provide this information. Enter SPA number as provided
PM Program Type	PM Program Type	Select one of the following three options as provided: Class – Select when standard maintenance will be provided on the vehicle Individual – Select when an agency specific PM schedule is being defined on the vehicle None – Select when no maintenance is required on the vehicle.
Equipment Type	Purpose	Vehicle's primary purpose. Select vehicle's primary purpose from choice list provided: Staff Transport Client Transport Materials Transport Law Enforcement Emergency Safety Construction Maintenance

Fleet Equipment – Meter Info

Data → Equipment Units → Fleet Equipment (Meter Info tab)

Highlighted fields are required upon insert.

When a **Meter Class** is selected the meter types for Meters 1 and 2 will automatically be displayed.

This tab tracks the latest meter readings for the equipment unit as well as meter history for the equipment unit. FASuite will manage meter roll-overs and meter resets/change outs.

Roll-overs are determined based on the Maximum meter value entered here. Be sure this is entered correctly for the equipment unit.

The **Life Total** at the bottom of the screen shows the total of all meters for the life of the vehicle.

FleetFocus - [Fleet Equipment]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Equipment ID: [] [New equipment unit]

Equipment class for meter types: []

Meter information

	Meter 1	Meter 2
Meter at delivery	[]	[]
Latest meter reading	[]	[]
Latest meter source	[]	[]
Latest meter date	[]	[]
Maximum meter value	999999 99999 9999 999	999999 99999 9999 999
Life total	[]	[]

Meter resets

Row	Delete	Date	Meter number	Reason	New me
*					

Ready Rec: ___ of ___



Fleet Equipment – Meter Info

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Equipment class for meter types	Meter Type	Type of use tracked by the vehicle's odometer, calculated in either miles or hours. Select appropriate meter type from choice list provided: Miles Only - Meters miles only Hours Only - Meters hours only Miles/Hours - Primary meter is miles Hours/Miles - Primary meter is hours
Meter at Delivery	In-service Odometer	Enter odometer reading at time vehicle is entered into state service.
Latest meter reading	Odometer reading	System will update odometer reading as needed from work order center, fuel tickets and ending month odometer reading.
Latest meter date	Odometer reporting date	Date of last odometer reading. The application will fill this field automatically when a new meter reading is entered.



Fleet Equipment - Classes

Data → Equipment Units → Fleet Equipment (Classes tab)

Highlighted fields are required upon insert.

Maintenance Class – This class is used to compare equipment costs for like equipment units, and to define comeback ranges.

PM Program Class – This class tracks vehicles with like PM patterns and checklists.

Funding Source – This class identifies the type of funds used to procure the vehicle

Rental Rates Class – This class specifies the rates you charge for usage of the vehicle, especially on a long term rental.

Resources Class – This class specifies the parts, skills, bays, and tools required for each task. Skill, bay, and tool requirements are currently used only by the Shop Scheduling module.

The screenshot shows the 'FleetFocus - [Fleet Equipment]' application window. The 'Classes' tab is selected in the 'Basic Info' section. The 'Equipment ID' field is highlighted in yellow. Below it, the 'Equipment class for:' section lists five categories: Maintenance, PM program, Funding Source, Rental rates, and Resources. Each category has a yellow-highlighted input field and a magnifying glass icon. The 'SLA equipment category' and 'Benchmarking class type' fields are also present. The status bar at the bottom indicates 'Ready' and 'Rec: ___ of ___'.



Fleet Equipment - Classes

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Equipment Class for Maintenance	Vehicle Class	Vehicle type as defined by SPA class codes. Select appropriate class code from choice list provided.
Equipment Class for PM Program	PM Schedule	Preventative maintenance schedule. Select PM schedule from choice list provided.
Funding Source	Procurement Funding Source	Source of funds for vehicle purchase. Select appropriate funding source from choice list provided.
Equipment Class for Rental Rates	Not Required by State of Texas	Select NONE from choice list provided
Equipment Class for Resources	Not Required by State of Texas	Select NONE from choice list provided

Data → *Equipment Units* → *Fleet Equipment* (*Locations tab*)

Highlighted fields are required upon insert.

Fleet Equipment - [Fleet Equipment]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Row Equipment ID Model year Manufacturer ID Model ID License number Operator ID Department ID Latest meter 1 rea

Class PM Program Individual PM Program Inspections **Codes** Recurring Costs Credit Cards **Acquisition** Registration

Multi-jurisdictional Registration Ownership and Depreciation Warranty Replacement and Disposition Position Info Additional Data

Basic Info Meter Info Classes **Locations** Assignments Accounts Status Motor Pool Authorization Comments

Equipment ID

Location type

Assigned PM Preferred PM shift

Assigned repair

Assigned mobile

Station

Stored

Current

Last fuel

Access rights

Ready Rec: ___ of ___

Assigned PM and Repair locations should be filled in if the vehicle is primarily serviced at a particular location.

Access Rights field must be filled with the correct agency location information to ensure you continue to have access to the vehicle's information.

Data → *Equipment Units* → *Fleet Equipment* (Assignments tab)

Highlighted fields are required upon insert.

If a vehicle is permanently assigned to an **Operator**, that information can be tracked on this tab.

FASuite also tracks the **Department** a vehicle is assigned to and which **Department to notify for PM**. If the vehicle is on temporary loan, that can be tracked as well.

[illegible]



Fleet Equipment - Assignments

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Operator Name	Assignment Detail	Individual or group to which vehicle is assigned. If vehicle is assigned to an individual, enter operator's name and title. If vehicle is assigned to a division or program, enter group name.
Department ID	Assignment	Designates vehicle as assigned to an individual, group or motor pool. Select appropriate vehicle designation from choice list provided: M - Motorpool O - Assigned to Organization I - Assigned to Individual G - General Use
Department to Notify for PM	Department to Notify for PM	Select NM – Notify Maintenance for PM.
Agency Equipment ID	Agency Specific Equipment Number	Agency specific equipment number if unique from SPA, license plate or system equipment numbers. Enter agency specific equipment number if unique from SPA, license or system equipment numbers.
Allow Commute to Home	Commute to Home	Designation of vehicle to be used to commute to and from an employee's home. Check box if assigned user is authorized to use the vehicle to commute to and from his/her home.

Data → *Equipment Units* → *Fleet Equipment (Status tab)*

Note: Checking Ready for disposition will display a message on every work order opened for that vehicle noting that the equipment is about to be disposed.

The screenshot displays the "Fleet Management - [Fleet Equipment]" application window. The top menu bar includes File, Edit, Action, Data, Queries/Reports, System Mgmt, View, Preferences, Window, and Help. Below the menu is a toolbar with various icons for file operations and navigation. A row of labels at the top identifies fields: Row, Equipment ID, Model year, Manufacturer ID, Model ID, License number, Operator ID, Department ID, and Latest meter 1 rea.

The main interface features a series of tabs: Class PM Program, Individual PM Program, Inspections, Codes, Recurring Costs, Credit Cards, Acquisition, and Registration. Under the "Acquisition" tab, there are sub-tabs: Multijurisdictional Registration, Ownership and Depreciation, Warranty, Replacement and Disposition, Position Info, and Additional Data. Further down, another set of tabs includes Basic Info, Meter Info, Classes, Locations, Assignments, Accounts, Status, Motor Pool, Authorization, and Comments. The "Status" tab is currently selected.

In the "Status" tab, the "Equipment ID" field is populated with a value from a dropdown menu. To the right is a button labeled "New equipment unit". Below this, the "Life cycle status code ID" is shown with a yellow background and a dropdown arrow. Other fields include "Service status", "Number of open work orders", and "Date and time of last yard check". On the right side, there are input fields for "Study code", "User status 1", "User status 2", "User status 3", "Cost center", "Radio number", and "Parking stall".

A checkbox labeled "Unit available for repair or PM" is present. At the bottom left, the "Equipment status" dropdown menu is open, showing options: IN SERVICE (highlighted), OUT OF SERVICE, AVAILABLE FOR PM, NOT FOUND, IN SHOP, WORK FINISHED, AWAITING TRANSFER - SHOP, and AWAITING TRANSFER - USER. To the right of this menu are four checkboxes: "Has tachometer", "Ready for disposition", "Usage tickets posted since last End of Period Equipment Usage processing", and "Meter readings posted since last End of Period Equipment Usage processing".

The bottom of the window shows a "Rec: ___ of ___" label and a "Ready" status indicator.



Fleet Equipment - Status

State of Texas Required Fields

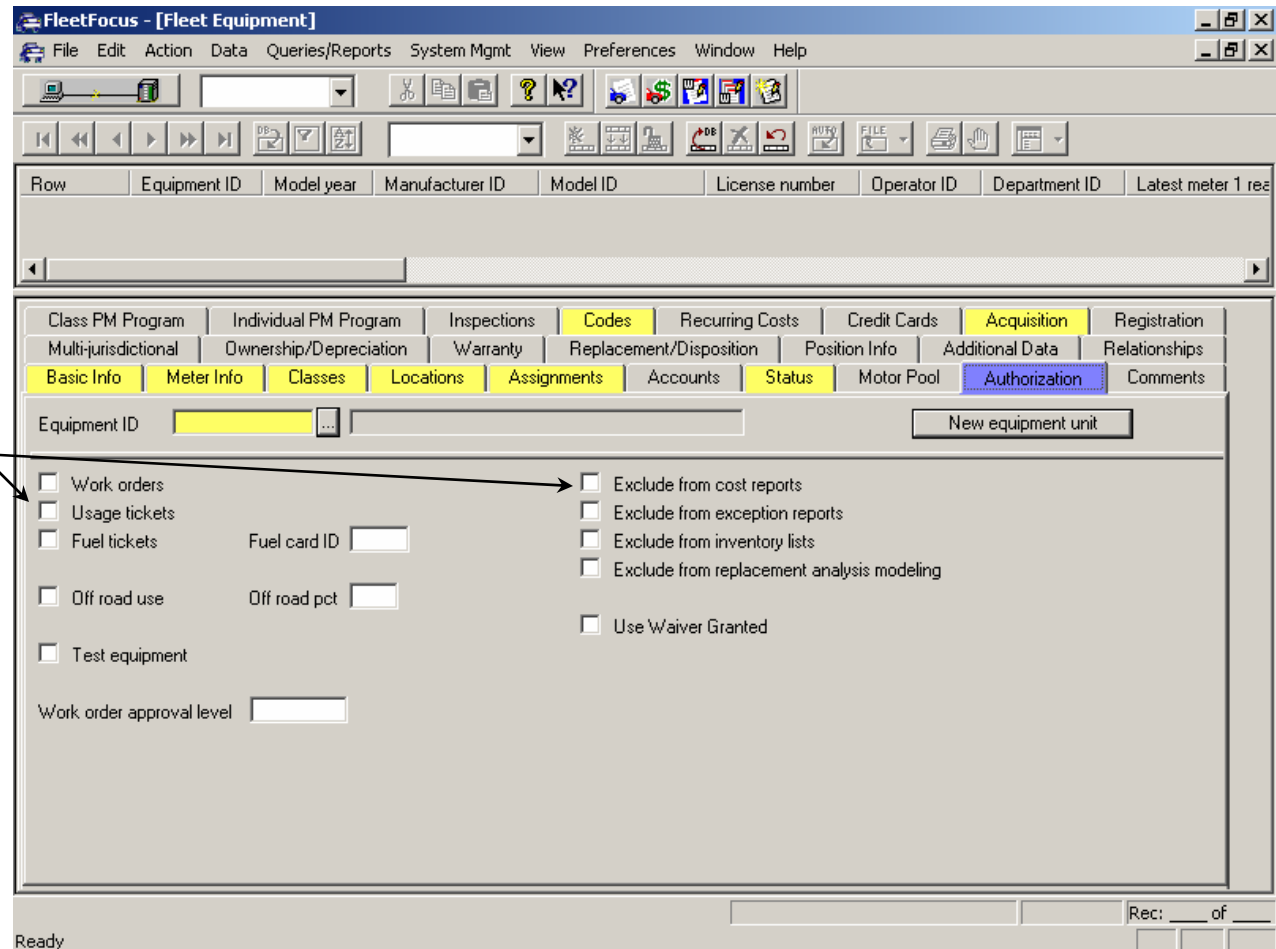
FleetFocus Field Name	State of Texas Required Data	Definition
Life Cycle Status Code	Life Cycle Status Code	Select appropriate vehicle designation from choice list provided: A – Active I - Inactive P – Pending Sale/Disposal R – Retired

Fleet Equipment - Authorization

Data → Equipment Units → Fleet Equipment (Authorization tab)

Highlighted fields are required upon insert.

Use this tab to authorize the vehicle for **Work orders**, **Usage tickets** and/or **Fuel tickets**. Once the vehicle is disposed, you can also choose to exclude the vehicle from various reports by checking the boxes on this tab.



FleetFocus - [Fleet Equipment]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Row Equipment ID Model year Manufacturer ID Model ID License number Operator ID Department ID Latest meter 1 read

Class PM Program Individual PM Program Inspections **Codes** Recurring Costs Credit Cards **Acquisition** Registration

Multi-jurisdictional Ownership/Depreciation Warranty Replacement/Disposition Position Info Additional Data Relationships

Basic Info Meter Info Classes Locations Assignments Accounts Status Motor Pool **Authorization** Comments

Equipment ID New equipment unit

☐ Work orders
☐ Usage tickets
☐ Fuel tickets Fuel card ID
☐ Off road use Off road pct
☐ Test equipment
 Work order approval level

☐ Exclude from cost reports
☐ Exclude from exception reports
☐ Exclude from inventory lists
☐ Exclude from replacement analysis modeling
☐ Use Waiver Granted

Ready Rec: ___ of ___



Fleet Equipment - Comments

Data → Equipment Units → Fleet Equipment (Comments tab)

Highlighted fields are required upon insert.

The **Comments** section on this tab can be used to track miscellaneous information about the equipment unit.

Any information entered in the **Messages** field will be displayed on every work order opened for that vehicle.

FleetFocus - [Fleet Equipment]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Row Equipment ID Model year Manufacturer ID Model ID License number Operator ID Department ID Latest meter 1 rea

Class PM Program Individual PM Program Inspections Codes Recurring Costs Credit Cards Acquisition Registration
Multi-jurisdictional Ownership/Depreciation Warranty Replacement/Disposition Position Info Additional Data Relationships
Basic Info Meter Info Classes Locations Assignments Accounts Status Motor Pool Authorization **Comments**

Equipment ID [Highlighted] [New equipment unit]

Use Description [Highlighted]

Messages [Highlighted]

Ready Rec: ___ of ___



Fleet Equipment - Comments

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Use Description	Primary Purpose Narrative	Detailed description of the primary purpose of the vehicle, providing enough information to justify a need for the vehicle.



Fleet Equipment - Warranty

Data → Equipment Units → Fleet Equipment (Warranty tab)

Highlighted fields are required upon insert.

In order to track **bumper to bumper warranty** for a vehicle, the following fields on this tab must be completed:

- **Vendor ID**
- **Expiration date**
- **Expiration life meter 1**
- **Expiration life meter 2** (optional)

Fleet Management - [Fleet Equipment]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Row Equipment ID Model year Manufacturer ID Model ID License number Operator ID Department ID Latest meter 1 rec

Class PM Program Individual PM Program Inspections **Codes** Recurring Costs Credit Cards **Acquisition** Registration

Basic Info Meter Info **Classes** Locations Assignments Accounts Status Motor Pool Authorization Comments

Multi-jurisdictional Registration Ownership and Depreciation **Warranty** Replacement and Disposition Position Info Additional Data

Equipment ID New equipment unit

Warranty information

Vendor ID

Expiration date

Expiration life meter 1

Expiration life meter 2

Deductible

Ready



Fleet Equipment - Warranty

State of Texas Required Fields

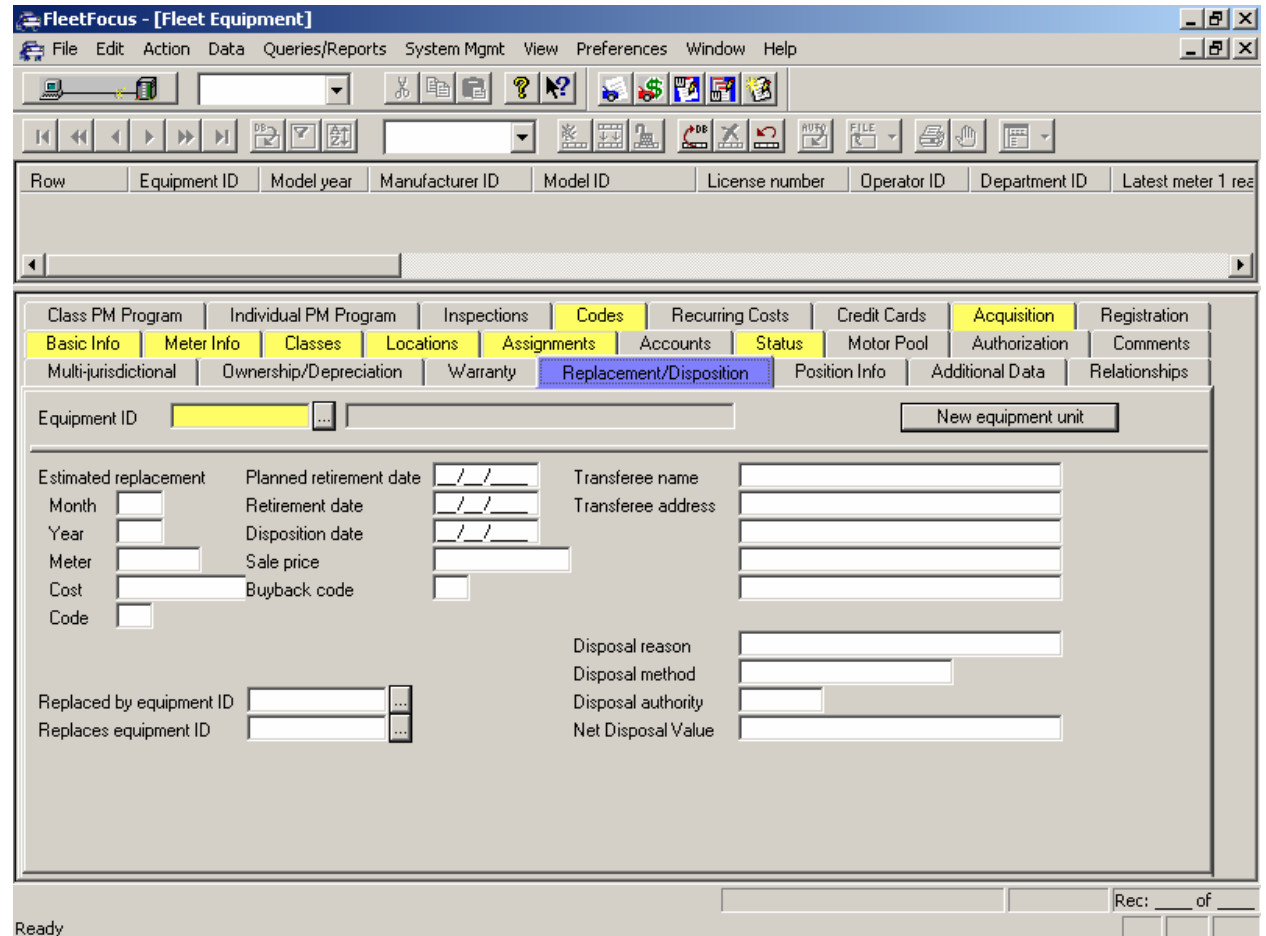
FleetFocus Field Name	State of Texas Required Data	Definition
Expiration Date	Warranty Expiration Date	Enter date vehicle warranty will expire. Include the cumulative warranty time if extended warranty purchased.
Expiration Life Meter 1	Warranty Expiration Meter	Enter mileage point triggering warranty expiration.

Fleet Equipment – Replacement and Disposition

Data → Equipment Units → Fleet Equipment (Replacement and Disposition tab)

Highlighted fields are required upon insert.

This tab is used to plan for equipment **replacement** and stores data concerning the vehicle's **disposition**.



FleetFocus - [Fleet Equipment]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Equipment ID (highlighted)

Equipment ID: []

Estimated replacement: []

Planned retirement date: []

Transferee name: []

Transferee address: []

Disposal reason: []

Disposal method: []

Disposal authority: []

Net Disposal Value: []

Replaced by equipment ID: []

Replaces equipment ID: []

New equipment unit

Ready



Fleet Equipment – Replacement and Disposition

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Planned Retirement Date	Replacement Schedule	Expected date of vehicle replacement based on State Vehicle Fleet Management Plan replacement guidelines. Enter the anticipated replacement date calculated by applying plan replacement guidelines to the vehicle in-service date.
Retirement Date	Out-of-Service Date	Date vehicle was permanently removed from agency service. Do not use this field to track vehicle down time for repair or other service.
Disposition Date	Disposal Date	Enter date vehicle was sold or ownership was transferred.
Sale Price	Disposal Price	Gross vehicle sale price or total value of other disposal methods. Enter dollar value of vehicle sale or disposal. Do not enter negative values.
Net Disposal Value	Net Disposal Value	Sale price less any incidental expenses related to the disposal process. Enter disposal value less any incidental expenses related to disposal.



Fleet Equipment – Additional Data

Data → Equipment Units → Fleet Equipment (Additional Data tab)

This tab is display only

This tab will display any optional features stored in the **Subsystems and Parts** section for this vehicle. Subsystems and Parts can be assigned to a vehicle based on Equipment ID, Equipment type, or Maintenance class.

The screenshot shows the 'Fleet Management - [Fleet Equipment]' application window. The 'Additional Data' tab is selected in the bottom-right pane. The main area displays a table titled 'Selected data from subsystems and parts' with columns: Row, Defined by, Subsystem, Property, and Description. The table is currently empty, showing only a header row and a single row with an asterisk in the 'Row' column. The top pane shows a menu bar (File, Edit, Action, Data, Queries/Reports, System Mgmt, View, Preferences, Window, Help) and a toolbar with various icons. The middle pane shows a list of equipment units with columns: Row, Equipment ID, Model year, Manufacturer ID, Model ID, License number, Operator ID, Department ID, and Latest meter 1 read. The bottom pane shows a list of tabs for different data sections: Class PM Program, Individual PM Program, Inspections, Codes, Recurring Costs, Credit Cards, Acquisition, Registration, Basic Info, Meter Info, Classes, Locations, Assignments, Accounts, Status, Motor Pool, Authorization, Comments, Multi-jurisdictional Registration, Ownership and Depreciation, Warranty, Replacement and Disposition, Position Info, and Additional Data. The 'Additional Data' tab is highlighted in blue. Below the tabs, there is a text box for 'Equipment ID' and a 'New equipment unit' button. The status bar at the bottom shows 'Ready' and 'Rec: ___ of ___'.

Row	Equipment ID	Model year	Manufacturer ID	Model ID	License number	Operator ID	Department ID	Latest meter 1 read
*								

Row	Defined by	Subsystem	Property	Description
*				

Fleet Equipment – Class PM Program

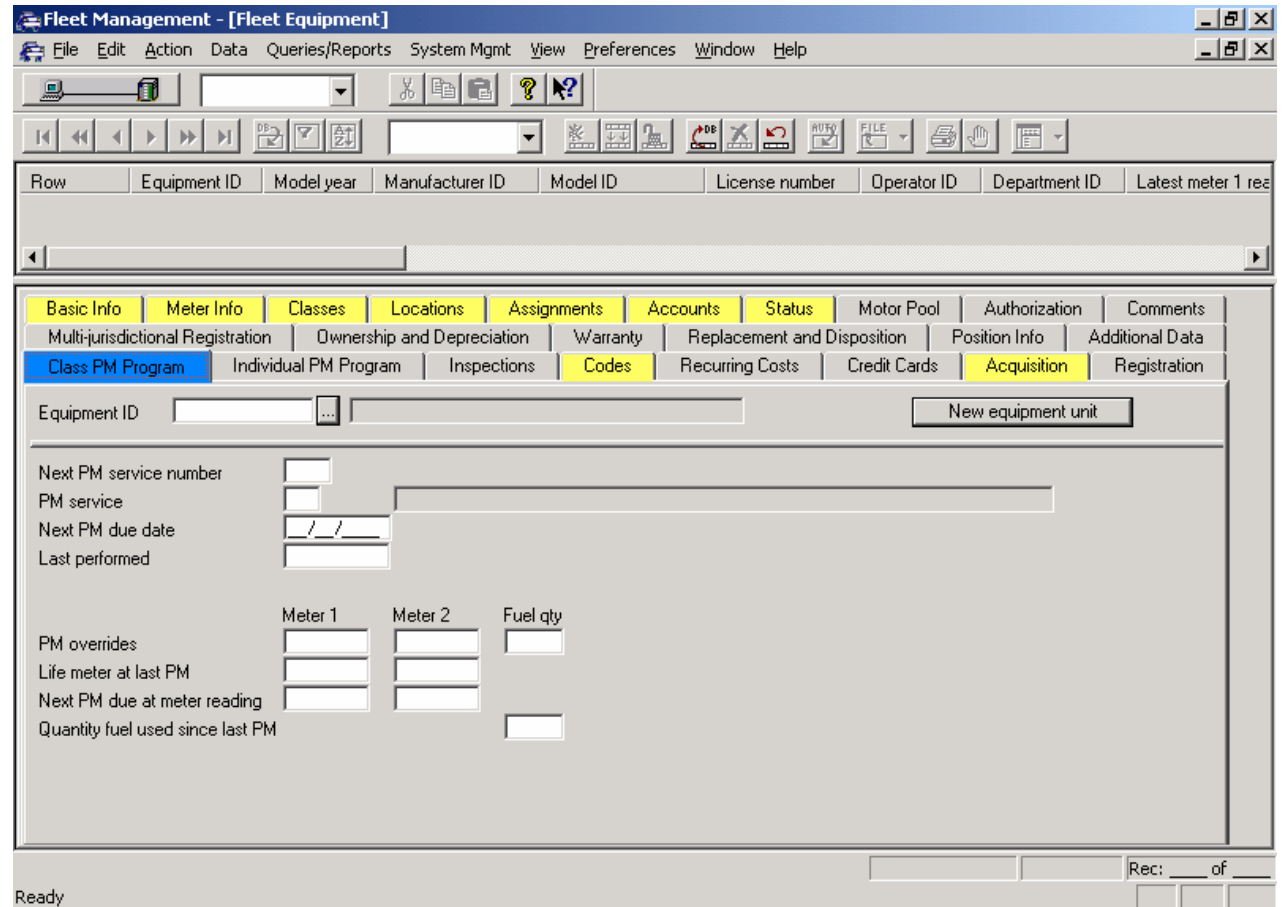
Data → Equipment Units → Fleet Equipment (Class PM Program tab)

Highlighted fields are required upon insert.

When ready to manage standardized **PM Program**, a vehicle will be assigned to a PM Class. Before FASuite will begin tracking PMs, this tab needs to be completed with the following information:

- **Next PM service number**
- **Next PM due date**
- **Life meter at last PM**

These values initiate the PM schedule for this equipment unit.



Fleet Management - [Fleet Equipment]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Equipment ID: []

Next PM service number: []

PM service: []

Next PM due date: []

Last performed: []

Meter 1: [] Meter 2: [] Fuel qty: []

PM overrides: []

Life meter at last PM: []

Next PM due at meter reading: []

Quantity fuel used since last PM: []

New equipment unit

Ready



Fleet Equipment - Inspections

Data → Equipment Units → Fleet Equipment (Inspections tab)

Highlighted fields are required upon insert.

Each vehicle will have its annual inspection tracked on this tab in the Additional Inspections group field.

To initialize Inspections:

1. In the **Additional Inspections** area select the **Inspection service(s)** that need to be performed on this unit.

2. For each service selected insert the following:

- Next due date
- Interval between inspections (in days)

Fleet Management - [Fleet Equipment]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Row Equipment ID Model year Manufacturer ID Model ID License number Operator ID Department ID Latest meter 1 rea

1	0102	1998	GMC	G2890		043	EQSVC	38123
---	------	------	-----	-------	--	-----	-------	-------

Multi-jurisdictional Registration Ownership and Depreciation Warranty Replacement and Disposition Position Info Additional Data

Basic Info Meter Info Classes Locations Assignments Accounts Status Motor Pool Authorization Comments

Class PM Program Individual PM Program **Inspections** Codes Recurring Costs Credit Cards Acquisition Registration

Equipment ID 0102 1998 GMC G2890 1997 GMC 4 YD DUMP TR New equipment unit

Next statutory inspection Inspection month NONE

Month Year Interval months

Additional inspections

Row	Delete	Inspection service	Last scheduled	Last performed	Next due	Interval (days)
*		M			06/01/2004	730
*		M		EMISSIONS TEST		

Ready

Rec: 1 of 1



Fleet Equipment - Codes

Data → Equipment Units → Fleet Equipment (Codes tab)

Highlighted fields are required upon insert.

Use this tab to track the **Fuel types** and Default priority for work performed on the vehicle.

The screenshot shows the FleetFocus - [Fleet Equipment] application window. The 'Codes' tab is selected, which is highlighted in blue. The 'Equipment ID' field is highlighted in yellow. The 'Fuel type 1' and 'Fuel type 2' fields are also highlighted in yellow. The 'Default priority ID for equipment unit on work orders' field is highlighted in yellow. The 'Quantity of tires' field is highlighted in yellow. The 'New equipment unit' button is visible. The status bar at the bottom shows 'Ready' and 'Rec: ___ of ___'.

Row	Equipment ID	Model year	Manufacturer ID	Model ID	License number	Operator ID	Department ID	Latest meter 1 read
-----	--------------	------------	-----------------	----------	----------------	-------------	---------------	---------------------

Basic Info | Meter Info | Classes | Locations | Assignments | Accounts | Status | Motor Pool | Authorization | Comments

Multi-jurisdictional | Ownership/Depreciation | Warranty | Replacement/Disposition | Position Info | Additional Data | Relationships

Class PM Program | Individual PM Program | Inspections | **Codes** | Recurring Costs | Credit Cards | Acquisition | Registration

Equipment ID: [Highlighted] [New equipment unit]

Fuel type 1: [Highlighted] []

Fuel type 2: [Highlighted] []

Oil type: []

OVFM Code: []

Default priority ID for equipment unit on work orders: [Highlighted] []

Quantity of tires: []

Ready

Rec: ___ of ___



Fleet Equipment - Codes

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Fuel Type 1	Primary Fuel Type	Primary fuel used to power the vehicle. Select appropriate fuel from choice list provided: BDL – Biodiesel CNG – Compressed Natural Gas DSL – Diesel ELE – Electricity ETH – Ethanol GAS – Gasoline LPG – Propane MTH - Methanol
Quantity of Tires	Number of Tires	Number of tires needed to operate vehicle. Number excludes any spare tires carried on the vehicle. Enter number of tires.



Fleet Equipment – Recurring Costs

Data → Equipment Units → Fleet Equipment (Recurring Costs tab)

Highlighted fields are required upon insert.

Any **costs** entered on this tab will be posted to the historical costs for the vehicle each time End of Month Processing is performed.

Fleet Management - [Fleet Equipment]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Equipment ID: []

Row: Equipment ID Model year Manufacturer ID Model ID License number Operator ID Department ID Latest meter 1 read

Basic Info Meter Info Classes Locations Assignments Accounts Status Motor Pool Authorization Comments

Multi-jurisdictional Registration Ownership and Depreciation Warranty Replacement and Disposition Position Info Additional Data

Class PM Program Individual PM Program Inspections Codes **Recurring Costs** Credit Cards Acquisition Registration

Equipment ID: [] [New equipment unit]

Fixed monthly cost: []

Fixed insurance cost: []

Fixed replacement cost: []

Fixed licensing cost: []

Other fixed cost 1: []

Other fixed cost 2: []

Other fixed cost 3: []

Insurance rate ID: [] []

Ready

Rec: of

Fleet Equipment - Acquisition

Data → Equipment Units → Fleet Equipment (Acquisition tab)

Highlighted fields are required upon insert.

This tab tracks the **acquisition** of the vehicle. The **Actual delivery date** and **Actual in service date** are required for active vehicles.

In order to have FASuite automatically calculate depreciation, the **Original cost** and **Capitalized value** (if applicable) must be entered on this tab (see FASuite Help for depreciation calculation definition).

Fleet Management - [Fleet Equipment]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Row Equipment ID Model year Manufacturer ID Model ID License number Operator ID Department ID Latest meter 1 rec

Basic Info Meter Info Classes Locations Assignments Accounts Status Motor Pool Authorization Comments

Multi-jurisdictional Registration Ownership and Depreciation Warranty Replacement and Disposition Position Info Additional Data

Class PM Program Individual PM Program Inspections **Codes** Recurring Costs Credit Cards **Acquisition** Registration

Equipment ID New equipment unit

	Planned	Actual
Delivery date	<input type="text"/>	<input type="text"/>
In service date	<input type="text"/>	<input type="text"/>

Original cost

Base MRP cost

Capitalized value

Date capitalized

Outfitting cost

Outfitting level

Row	Delete	Vendor ID	Purchase order number	Order date
*				

Authorization ID

Title

Shipping cost

Duty cost

VAT cost

☐ Capitalized cost posted recently

Ready



Fleet Equipment - Acquisition

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Original Cost	Acquisition Cost	Original cost to acquire vehicle. Cost excludes components or add-ons not part of the original purchase agreement. Cost of transferred vehicles is the book value carried in SPA. Enter dollar value of acquisition.
In Service Date - Actual	In-service Date	Enter date vehicle entered into use for agency operations.
Delivery Date - Actual	Acquisition Date	Date vehicle was accepted or received. For new vehicles, enter date vehicle was accepted or received. For transferred vehicles, enter date vehicle was delivered.
Outfitting Cost	Added Equipment Cost	After market vehicle additions, such as tool boxes, cargo racks, light bars, radios, etc. Enter total dollar value of all equipment added to vehicle.
Capitalized Value	Capitalized Value	Total cost of vehicle (new or transferred) including conversions, components, and/or add-ons affixed to the vehicle. Enter dollar amount of vehicle's capitalized value.



Fleet Equipment - Registration

Data → Equipment Units → Fleet Equipment (Registration tab)

Highlighted fields are required upon insert.

This tab tracks **registration** information for the vehicle.

The screenshot shows the 'Fleet Management - [Fleet Equipment]' application window. The 'Registration' tab is selected in the bottom navigation bar. The main form area contains the following fields:

- Equipment ID: (highlighted)
- License number: (highlighted)
- Issuing government: (highlighted)
- License number 2: (highlighted)
- Original registration date: (highlighted)
- Registration expiration date: (highlighted)
- Date of permission to operate on roads: (highlighted)
- Certificate of roadworthiness number: (highlighted)
- Date of certificate of roadworthiness: (highlighted)
- Restricted area pass number: (highlighted)

A 'New equipment unit' button is located to the right of the Equipment ID field. The status bar at the bottom indicates 'Ready' and 'Rec: ___ of ___'.



Fleet Equipment - Registration

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
License Number	License Plate Number	License plate number as listed on vehicle registration. Enter license plate number as provided.



Fleet Equipment – Ownership/Depreciation

Data → Equipment Units → Fleet Equipment (Ownership/Depreciation tab)

Highlighted fields are required upon insert.

This tab tracks **ownership and depreciation** information for the vehicle.



Fleet Equipment – Ownership/Depreciation

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Depreciation Method	Depreciation Rate	Rate at which vehicle's value will be depreciated. Select straight line depreciation from choice list provided.
Salvage Value	Current Book Value	Book value of vehicle as carried in SPA system. Enter book value as carried in SPA System at time of disposal.



Fleet Equipment – Wizard

Data → Equipment Units → Fleet Equipment

Fleet Management - [Fleet Equipment]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Navigation icons: Back, Forward, Home, Search, etc.

Row	Equipment ID	Model year	Manufacturer ID	Model ID	License number	Operator ID	Department ID	Latest meter 1 read
-----	--------------	------------	-----------------	----------	----------------	-------------	---------------	---------------------

Class PM Program | Individual PM Program | Inspections | Codes | Recurring Costs | Credit Cards | Acquisition | Registration | Multi-jurisdictional Registration | Ownership and Depreciation | Warranty | Replacement and Disposition | Position Info | Additional Data | Basic Info | Meter Info | Classes | Locations | Assignments | Accounts | Status | Motor Pool | Authorization | Comments

Equipment ID: **New equipment unit**

Model year: PM program type: CLASS, INDIVIDUAL, NONE

Man ID:

Model ID:

Equipment type:

Description:

Color:

Serial number:

Asset number:

Associated file:

Path and file name:

Description:

Ready Rec: ___ of ___

Click on the **New equipment unit** button.

Fleet Equipment – Wizard

Data → Equipment Units → Fleet Equipment

FASuite will guide you through a series of dialog boxes that let you quickly enter required information and create a new record. After you complete the Wizard, the Fleet Equipment screen validates the data by placing the information in the appropriate fields and displays them before processing. This allows you to add additional information as required.

Add New Equipment Unit Wizard - Basic Information

Basic Information:

Equipment ID

Model Year

Manufacturer

Model

Equipment Type

Description

VIN/Serial Number

Add New Equipment Unit Wizard - Class Information

Equipment Classes:

Maintenance Class

PM Class

Meter Class

Rental Rate Class

Standards Class

Resources Class



Fleet Equipment – De-Activating Equipment

Data → **Equipment Units** → **Fleet Equipment (Authorization tab)**

1. Use the **Filter** to limit the display to the equipment ID you want.

2. Click **Unlock**.

3. Uncheck the following boxes:

- **Work orders**
- **Usage Tickets**
- **Fuel Tickets**

4. Check the following “Exclude from” boxes:

- **Cost reports**
- **Exception reports**
- **Inventory Lists**

NOTE: When you change the Life cycle status code ID (on the Status tab) from “active” to not “active”, FASuite will automatically check the Exclude from inventory lists box for you.

Components

Data → *Equipment Units* → *Component* → *Primary Information*

Should this item be a Component?

- The item has its own identification measures such as a serial number or meter
- You want to track information and costs about the item separately
- The item **may or may not** be attached to or associated with an equipment unit
- The item does not have any licensing or registration

FleetFocus - [Components - Primary Information]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Equipment ID: []

Model year: []

Manufacturer ID: []

Model ID: []

Equipment type: []

Description: []

Serial number: []

Asset number: []

Part ID: []

Part suffix: []

Position: []

PM program type: CLASS, NONE

Ready Rec: 1 of 1 NUM



Components – Basic Info

Data → *Equipment Units* → *Component* → *Primary Information (Basic Info tab)*

Highlighted fields are required upon insert.

- Equipment ID
- Model year
- Manufacturer ID
- Model ID
- Equipment type
- Description

FleetFocus - [Components - Primary Information]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Row Equipment ID Model year Manufacturer ID Model ID Operator ID Department ID Equipment type Serial number Meter types class Maintenan

Codes Recurring Costs Acquisition Ownership and Depreciation Warranty Replacement and Disposition Component Relationship

Basic Info Meter Info Classes Locations Assignments Accounts Status Authorization Comments Class PM Program

Equipment ID []

Model year []

Manufacturer ID []

Model ID []

Equipment type []

Description []

Serial number []

Asset number []

Part ID []

Part suffix []

Position []

PM program type
CLASS
NONE

Ready

Rec: ___ of ___
NUM

Components – Meter Info

Data → *Equipment Units* → *Component* → *Primary Information (Meter Info tab)*

Highlighted fields are required upon insert.

When a **Meter Class** is selected the meter type for Meters 1 will automatically be displayed.

This tab tracks the latest meter reading for the component as well as meter history for the component. FASuite will manage meter roll-overs and meter resets/change outs.

Roll-overs are determined based on the Maximum meter value entered here. Be sure this is entered correctly for the component.

The **Life Total** at the bottom of the screen shows the total for the life of the vehicle.

FleetFocus - [Components - Primary Information]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Row Equipment ID Model year Manufacturer ID Model ID Operator ID Department ID Equipment type Serial number Meter types class Maintenar

Codes Recurring Costs Acquisition Ownership and Depreciation Warranty Replacement and Disposition Component Relationship

Basic Info **Meter Info** Classes Locations Assignments Accounts Status Authorization Comments Class PM Program

Equipment ID [Highlighted]

Equipment class for meter types [Highlighted]

Life total - parent meter 1 []

Meter information

Meter 1

Meter at delivery []

Latest meter reading []

Latest meter source []

Latest meter date []

Maximum meter value [999999]

Life total []

Meter resets

Row	Delete	Date	Meter number	Reason	New me
*					

Ready

Rec: [] of []

NUM



Components - Classes

Data → *Equipment Units* → *Component* → *Primary Information (Classes tab)*

Highlighted fields are required upon insert.

Maintenance Class – This class is used to compare costs for like equipment, and to define comeback ranges.

PM Program Class – This class tracks components with like PM patterns and checklists.

Funding Source – This class identifies the type of funds used to procure the component.

Rental Rates Class – This class specifies the rates you charge for usage of the component, especially on a long term rental.

Resources Class – This class specifies the parts, skills, bays, and tools required for each task. Skill, bay, and tool requirements are currently used only by the Shop Scheduling module.

FleetFocus - [Components - Primary Information]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Row Equipment ID Model year Manufacturer ID Model ID Operator ID Department ID Equipment type Serial number Meter types class Maintenar

Codes Recurring Costs Acquisition Ownership and Depreciation Warranty Replacement and Disposition Component Relationship

Basic Info Meter Info Classes Locations Assignments Accounts Status Authorization Comments Class PM Program

Equipment ID

Equipment class for:

Maintenance		
PM program		
Standards		
Rental rates		
Resources		

Ready Rec: ___ of ___ NUM



Components - Locations

Data → *Equipment Units* → *Component* → *Primary Information (Locations tab)*

Highlighted fields are required upon insert.

Assigned PM and Repair locations should be filled in if the component is primarily serviced at a particular location.

FleetFocus - [Components - Primary Information]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Row Equipment ID Model year Manufacturer ID Model ID Operator ID Department ID Equipment type Serial number Meter types class Maintenar

Codes Recurring Costs Acquisition Ownership and Depreciation Warranty Replacement and Disposition Component Relationship

Basic Info Meter Info Classes **Locations** Assignments Accounts Status Authorization Comments Class PM Program

Equipment ID []

Assigned PM location ID []

Preferred PM shift []

Assigned repair location ID []

Station location ID []

Stored location ID []

Current location ID []

Last fuel location ID []

Access rights location ID []

Ready Rec: of NUM



Components - Assignments

Data → *Equipment Units* → *Component* → *Primary Information (Assignments tab)*

Highlighted fields are required upon insert.

If a component is permanently assigned to an **Operator**, that information can be tracked on this tab.

FASuite also tracks the **Department** a component is assigned to and which **Department to notify for PM**.

FleetFocus - [Components - Primary Information]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Row Equipment ID Model year Manufacturer ID Model ID Operator ID Department ID Equipment type Serial number Meter types class Maintenar

Codes Recurring Costs Acquisition Ownership and Depreciation Warranty Replacement and Disposition Component Relationship

Basic Info Meter Info Classes Locations Assignments Accounts Status Authorization Comments Class PM Program

Equipment ID [Highlighted]

Operator ID [Highlighted]

Operator name

Department ID [Highlighted]

Department to notify for PM [Highlighted]

Tax code ID

Company ID

Associated equipment ID

Associated file

Path and file name

Description

Ready

Rec: ___ of ___

NUM



Components - Status

Data → *Equipment Units* → *Components* → *Primary Information* (Status tab)

Highlighted fields are required upon insert.

The **Life Cycle Status Code** is required when creating a new Component in FASuite. Change this ID to track the component during its life cycle.

Note: Checking Ready for disposition will display a message on every work order opened for that component noting that it is about to be disposed.

FleetFocus - [Components - Primary Information]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Row	Equipment ID	Model year	Manufacturer ID	Model ID	Operator ID	Department ID	Equipment type	Serial number	Meter types class	Maintenan
-----	--------------	------------	-----------------	----------	-------------	---------------	----------------	---------------	-------------------	-----------

Codes Recurring Costs Acquisition Ownership and Depreciation Warranty Replacement and Disposition Component Relationship

Basic Info Meter Info Classes Locations Assignments Accounts Status Authorization Comments Class PM Program

Equipment ID []

Life cycle status code ID [] Status []

Service status [] Cost center []

Number of open work orders []

Equipment status: IN SERVICE, OUT OF SERVICE, AVAILABLE FOR PM, NOT FOUND, IN SHOP, WORK FINISHED, AWAITING TRANSFER - SHOP, AWAITING TRANSFER - USER

☐ Ready for disposition

☐ Usage tickets posted since last End of Period Equipment Usage processing

☐ Meter readings posted since last End of Period Equipment Usage processing

Ready Rec: ___ of ___ NUM



Components - Authorization

Data → Equipment Units → Components → Primary Information (Authorization tab)

Highlighted fields are required upon insert.

Use this tab to authorize the component for **Work orders**, **Usage tickets** and/or **Fuel tickets**. Once the component is disposed, you can also choose to exclude the component from various reports by checking the boxes on this tab.

FleetFocus - [Components - Primary Information]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Row Equipment ID Model year Manufacturer ID Model ID Operator ID Department ID Equipment type Serial number Meter types class Maintenan

Codes Recurring Costs Acquisition Ownership and Depreciation Warranty Replacement and Disposition Component Relationship

Basic Info Meter Info Classes Locations Assignments Accounts Status Authorization Comments Class PM Program

Equipment ID [] Fuel card ID []

☐ Work orders ☐ Exclude from cost reports

☐ Usage tickets ☐ Exclude from exception reports

☐ Fuel tickets ☐ Exclude from inventory lists

☐ Test equipment ☐ Exclude from replacement analysis modeling

Work order approval level [] ☐ Track meter 1 of parent equipment unit

Ready Rec: ____ of ____ NUM



Components – Class PM Program

Data → Equipment Units → Components → Primary Information (Class PM Program tab)

Highlighted fields are required upon insert.

When ready to manage standardized **PM Program**, a component will be assigned to a PM Class. Before FASuite will begin tracking PMs, this tab needs to be completed with the following information:

- **Next PM service number**
- **Next PM due date**
- **Life meter at last PM**

These values initiate the PM schedule for this component.

FleetFocus - [Components - Primary Information]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Equipment ID: []

Next PM service number: []

PM service: []

Next PM due date: []

Last performed: []

PM overrides: []

Life meter at last PM: []

Next PM due at meter reading: []

Quantity fuel used since last PM: []

Rec: ____ of ____

NUM

Data → *Equipment Units* → *Components* → *Primary Information* (Codes tab)

Use this tab to track the **Fuel types** and Default priority for work performed on the vehicle.

Ready



Components - Acquisition

Data → *Equipment Units* → *Components* → *Primary Information* (Acquisition tab)

Highlighted fields are required upon insert.

This tab tracks the **acquisition** of the component. The **Actual delivery date** and **Actual in service date** are required for active components.

In order to have FASuite automatically calculate depreciation, the **Original cost** and **Capitalized value** (if applicable) must be entered on this tab (see FASuite Help for depreciation calculation definition).

FleetFocus - [Components - Primary Information]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Row Equipment ID Model year Manufacturer ID Model ID Operator ID Department ID Equipment type Serial number Meter types class Maintenar

Basic Info Meter Info Classes Locations Assignments Accounts Status Authorization Comments Class PM Program
Codes Recurring Costs **Acquisition** Ownership and Depreciation Warranty Replacement and Disposition Component Relationship

Equipment ID []

Planned Actual

Delivery date [] []

In service date [] []

Original cost []

Capitalized value []

Date capitalized []

Authorization ID [] Shipping cost []

Title [] Duty cost []

VAT cost []

☐ Capitalized cost posted recently

Row Delete Vendor ID Purchase order number Order date

* [] [] []

Ready Rec: of NUM



Components - Warranty

Data → Equipment Units → Components → Primary Information (Warranty tab)

Highlighted fields are required upon insert.

In order to track **bumper to bumper warranty** for a component, the following fields on this tab must be completed:

- **Vendor ID**
- **Expiration date**
- **Expiration life meter 1**

The screenshot shows the FleetFocus application window with the title bar "FleetFocus - [Components - Primary Information]". The menu bar includes File, Edit, Action, Data, Queries/Reports, System Mgmt, View, Preferences, Window, and Help. The toolbar contains various icons for file operations and data management. Below the toolbar is a grid of field headers: Row, Equipment ID, Model year, Manufacturer ID, Model ID, Operator ID, Department ID, Equipment type, Serial number, Meter types class, and Maintenance. The main area displays the "Warranty" tab, which is highlighted in blue. The tab contains the following fields: Equipment ID (highlighted in yellow), Warranty information (a section header), Vendor ID (highlighted in yellow), Expiration date (highlighted in yellow), Expiration meter 1 (highlighted in yellow), and Deductible (highlighted in yellow). The status bar at the bottom shows "Ready" and "Rec: ___ of ___ NUM".



Locations

Data —→ *Setup* —→ *Organizational Setup* —→ *Locations*

FleetFocus - [Locations]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Location ID: 303000 Name: TX BLDG & PROCUREMENT Contact name: LEA ANNE BARTEE Address line 1: 1711 SAN JACINTO BLVD. RM# 112 Address line 2: AUSTIN TX

Motor Pool	Rates and Markups	Roll-ups	Work Calendar	Message Printer
Basic Info	Functions	Work Orders	Work Orders - More Info	Inventory
Inventory - More Info				

Location ID: 303000 Name: TX BLDG & PROCUREMENT

Name: TX BLDG & PROCUREMENT County: TRAVIS

Contact name: LEA ANNE BARTEE Tax code:

Address: 1711 SAN JACINTO BLVD. RM# 112
AUSTIN
TX
78701-1416

Phone: 512-463-8174
Fax: 512-463-3400

Ready Rec: 1 of 1

Start Texas > Re: State of ... Microsoft Powe... FleetFocus - [Document1 - Mi... 12:55 PM



Locations – Basic Info

Data → *Setup* → *Organizational Setup* → *Locations (Basic Info tab)*

When entering a new location, be sure to enter as much information as possible.

Location ID must be a unique value and the **Name** field is also required.

The screenshot shows the FleetFocus - [Locations] application window. The menu bar includes File, Edit, Action, Data, Queries/Reports, System Mgmt, View, Preferences, Window, and Help. The toolbar contains various icons for file operations and data management. Below the toolbar is a table with the following data:

Row	Location ID	Name	Contact name	Address line 1	Address line 2	Address
1	303000	TX BLDG & PROCUREMENT	LEA ANNE BARTEE	1711 SAN JACINTO BLVD. RM# 112	AUSTIN	TX

Below the table is a form for entering location details. The form has tabs for Motor Pool, Rates and Markups, Roll-ups, Work Calendar, and Message Printer. The Basic Info tab is selected. The form fields are as follows:

Location ID: 303000, Name: TX BLDG & PROCUREMENT

Name: TX BLDG & PROCUREMENT, County: TRAVIS

Contact name: LEA ANNE BARTEE, Tax code:

Address: 1711 SAN JACINTO BLVD. RM# 112, AUSTIN, TX, 78701-1416

Phone: 512-463-8174, Fax: 512-463-3400

Email address:

Ready

Rec: 1 of 1

NUM

Start | Texas | > Re: State of ... | Microsoft Powe... | FleetFocus - [...] | Document1 - Mi... | 12:55 PM



Locations – Basic Info

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Address – Line 1	Street Address	Enter the street address
Address – Line 2	City	Enter the city
Address – Line 3	State	Enter the state
Address – Line 4	Zip	Enter the zip code



Locations – Functions

Data —→ *Setup* —→ *Organizational Setup* —→ *Locations (Functions tab)*

Specify the function this location will serve. The function(s) specified will dictate fields on other tabs that will also need to be completed.

The screenshot shows the FleetFocus - [Locations] application window. The menu bar includes File, Edit, Action, Data, Queries/Reports, System Mgmt, View, Preferences, Window, and Help. The toolbar contains various icons for file operations and data management. The main window displays a table with the following data:

Row	Location ID	Name	Contact name	Address line 1	Address line 2	Add
1	303000	TX BLDG & PROCUREMENT	LEA ANNE BARTEE	1711 SAN JACINTO BLVD. RM# 112	AUSTIN	TX

Below the table, the 'Functions' tab is selected. It shows the 'Location ID' as 303000 and the 'Name' as TX BLDG & PROCUREMENT. The 'Functions' section includes a list of checkboxes for various functions:

- ☐ Shop (regular)
- ☐ Shop (mobile)
- ☐ Shop (external)
- ☒ Equipment site
- ☐ Fueling site
- ☐ Parts inventory
- ☐ Pool (dispatch)
- ☒ Station
- ☐ Test
- ☐ Shop scheduling active
- ☐ Operations

The status bar at the bottom indicates 'Ready' and 'Rec: 1 of 1'. The taskbar shows the Start button and several open applications: Texas, Re: Stat..., Microsoft P..., FleetFocu..., and Document1... The system clock shows 12:55 PM.



Subsystems - Parts - Specifications

Section III



Section III Contents

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3. Adding a New Part	89
4. Parts Primary	90
5. Parts Location	92
6. Parts Inventory Adjustments	96
7. Vendor/Part Information	97
8. Parts Cross-references	99



Subsystems and Parts - Overview

Data → Equipment Units → Subsystems and Parts

An equipment unit or equipment type may have many subsystems such as body, engine, transmission, fuel, air, brakes, etc. Typically, subsystems have their own identification measures such as a serial number or meter, and are fixed (cannot be moved from one equipment unit to another). You usually do not want to track information about them separately from the equipment unit of which they are a part.

The purpose of the Subsystems and Parts screen is to assign subsystems and parts to equipment types and equipment units, and to define the properties (elements) that the subsystems consist of.

EXAMPLE: You can define a fuel system as a subsystem of equipment type diesel bus (or of equipment unit #001). You can then define parts for the subsystem, such as fuel filter, fuel pump, fuel cap, fuel key number, etc.

Remember, much of the information about a vehicle is equipment type specific. Enter general information once for an equipment type instead of entering it for each vehicle.

What will this screen do for you?

- Allows users to find answers to questions about specifications such as "Which units have Detroit Diesel series 60 engines?"
- Allows users to build their recall campaigns by Subsystem or Property.
- Allows users to "share" specification information on the Equipment Primary tab to support maintenance staff inquires without them needing to know anything more than use a Zoom button from Work order center.
- Allows a coding structure with Property IDs that can mimic VMRS Repair Groups.
- Allows a "Template" approach using the copy key to add needed data for new Equipment units.

Subsystems and Parts - Entry

Data → Equipment Units → Subsystems and Parts

1. Click **Prepare for insert**.

2. Enter the **Equipment ID**.

3. Enter the **Subsystem**.

4. Under the **Property** column, enter the subsystems that you want to enter data for (engine size, tire, etc).

5. In the **Description** column, enter the values for each property entered in step 4.

6. Place a check in the **Display on equipment primary** checkbox for all data you want to display on the **Additional Data** tab of the **Fleet Equipment** screen.

Row	Equipment type	Equipment class for maintenance	Equipment ID	Subsystem	Print on PM orders	Include sub
			G1062897	EQUIP SPECIFICATIONS		

Property	Description	OEM part number	Display on equipment primary
ENGINE SIZE	3.6		X
TIRE	P225/75R		X
GROSS VEHICLE WEIGHT	3200		X
FUEL CAP	20		X
PAYLOAD	N/A		X

7. Click **Process** to save entry.



Fleet Equipment – Subsystems and Parts

State of Texas Required Fields

FleetFocus Subsystem	FleetFocus Property	FleetFocus Description	State of Texas Required Data	Definition
Engine	Size	Key actual displacement	Engine Size	Engine size, in either liters or cubic inches as provided by the manufacturer.
Engine	Qty Cylinders	Key number of cylinders.	Number of Cylinders	Number of cylinders as provided by the manufacturer.
Transmission	Transmission	‘Automatic’ or ‘Manual.’	Transmission	Designation of manual or automatic transmission.
Attributes	Wheel	Key ‘4 wheel drive’, ‘2 wheel drive’	Drive Type	Designation of 2-wheel or 4-wheel drive.
Tire Size	Tire	Key actual size.	Tire Size	Tire specifications as provided by the vehicle manufacturer.

For all entries – check “Display on Equipment Primary” field



Fleet Equipment – Subsystems and Parts (continued)

State of Texas Required Fields

FleetFocus Subsystem	FleetFocus Property	FleetFocus Description	State of Texas Required Data	Definition
Attributes	Description	Enter emissions rating in following format: # VER	Vehicle Emissions Rating	Vehicle emissions rating (VER) as provided by the manufacturer.
Attributes	Description	Enter average mileage in following format: ## / ## (city/highway average miles)	EPA MPG Rating	Average mileage in both the city and highway as approved by the EPA and provided by the manufacturer.
Parts	Select applicable option from choice list, if unavailable select 1,2,3,etc.	Key additional detailed information as appropriate.	Factory Installed Options	Optional equipment or vehicle specifications installed by the manufacturer prior to purchase or delivery.

For all entries – check “Display on Equipment Primary” field



Fleet Equipment - Additional Data Information

Data → Equipment Units → Fleet Equipment (Additional Data tab)

All Subsystems and Properties created with a check in the **Display on equipment primary** checkbox (see page 29) will display on the **Additional Data** tab of the **Fleet Equipment** screen.

NOTE: Additional rows on this tab will slow the retrieval of data on this screen, so only mark the subsystems and properties that are necessary to see here.

Fleet Management - [Fleet Equipment]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Equipment ID: 00-7675, Model year: 2000, Manufacturer ID: FORD, Model ID: F250, License number: HBD036, Operator ID: 1111, Department ID: 015, Latest meter 1 read: 66025

Basic Info | Meter Info | Classes | Locations | Assignments | Accounts | Status | Motor Pool | Authorization | Comments

Class PM Program | Individual PM Program | Inspections | Codes | Recurring Costs | Credit Cards | Acquisition | Registration

Multi-jurisdictional Registration | Ownership and Depreciation | Warranty | Replacement and Disposition | Position Info | **Additional Data**

Equipment ID: 00-7675, 2000 FORD F250 TRUCK, New equipment unit

Selected data from subsystems and parts

Row	Defined by	Subsystem	Property	Description
1	Equipment type	SPECIFICATIONS	02-CAB CONVENTIONAL	CONVT CAB
2	Equipment type	SPECIFICATIONS	02-CAB TO AXLE=	92
3	Equipment type	SPECIFICATIONS	02-GRAPHICS PKG A	
4	Equipment type	SPECIFICATIONS	02-UNIT HEIGHT=	85
5	Equipment type	SPECIFICATIONS	02-UNIT OVERALLGTH=	287
6	Equipment type	SPECIFICATIONS	11-AXLE FRONT RATING	14000
7	Equipment type	SPECIFICATIONS	11-AXLES NO.=2	12500
8	Equipment type	SPECIFICATIONS	11-AXLES NO.=3	12500
9	Equipment type	SPECIFICATIONS	12-AXLE REAR RATIO	5.55
10	Equipment type	SPECIFICATIONS	12-AXLE REAR TANDEM	YES
11	Equipment ID	ENGINE	SERIAL NO	7898R8909

Ready, Rec: 1 of 1



Specifications – Basic Info

Data → Equipment Units → Specifications (Basic Info tab)

FleetFocus - [Equipment - Specifications]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Quantity of axles Cab axle length Wheelbase Frame section modulus Sheave height Insurance data Passengers Tare weight Scale weight GV

Basic Info Weights Capacities Component Warranties Special Equipment

Equipment ID

Quantity of axles Sheave height

Cab axle length Insurance data

Wheelbase Passengers

Frame section modulus

Comment

Ready Rec: ___ of ___

General specifications about an equipment unit may be entered on this tab.



Specifications – Basic Info

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Wheelbase	Wheelbase	Vehicle's wheelbase measurement as provided by the manufacturer. Enter wheelbase measurement as provided.
Passengers	Passenger Capacity	Enter total number of passengers vehicles can carry, including the driver.



Specifications – Weights

Data → Equipment Units → Specifications (Weights tab)

FleetFocus - [Equipment - Specifications]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Row Equipment ID Quantity of axles Cab axle length Wheelbase Frame section modulus Sheave height Insurance data Passengers Tare weight Scale weight GV

Basic Info **Weights** Capacities Component Warranties Special Equipment

Equipment ID

Weights

Tare

Scale

GVWR

Lic gross ☐ Unit qualifies for heavy-vehicle use tax

Row	Delete	Type	Date	Front	Rear	Total
<input type="text"/>						

Ready

Rec: ___ of ___

Use this tab to enter weight information.



Specifications – Weights

State of Texas Required Fields

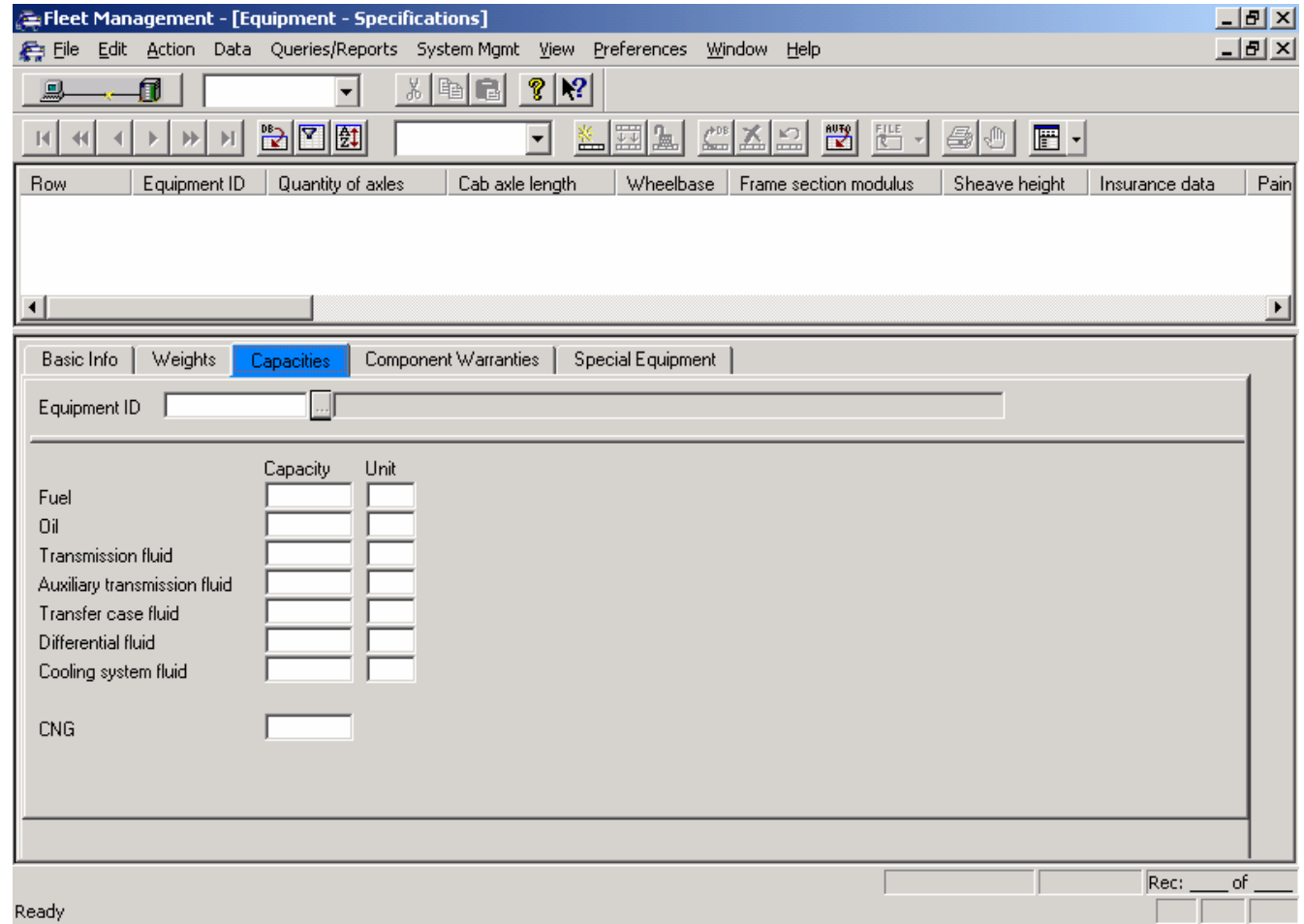
FleetFocus Field Name	State of Texas Required Data	Definition
GVWR	GVWR	Gross Vehicle Weight Rating (GVWR) as provided by the manufacturer. Enter GVWR as provided.

Specifications – Capacities

Data → Equipment Units → Specifications (Capacities tab)

Use this tab to enter fuel and fluid capacities.

NOTE: The values entered on this tab will be validated when processing fuel and fluids.



The screenshot shows the 'Fleet Management - [Equipment - Specifications]' window with the 'Capacities' tab selected. The window has a menu bar (File, Edit, Action, Data, Queries/Reports, System Mgmt, View, Preferences, Window, Help) and a toolbar with various icons. Below the toolbar is a table with columns: Row, Equipment ID, Quantity of axles, Cab axle length, Wheelbase, Frame section modulus, Sheave height, Insurance data, and Pain. The 'Capacities' tab is active, showing a form for entering equipment capacities. The form includes a text field for 'Equipment ID' and a table for entering capacities for various fluids and CNG.

	Capacity	Unit
Fuel		
Oil		
Transmission fluid		
Auxiliary transmission fluid		
Transfer case fluid		
Differential fluid		
Cooling system fluid		
CNG		

At the bottom of the window, there is a status bar with the text 'Ready' and a record counter 'Rec: ___ of ___'.



Specifications – Capacities

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Oil (Capacity and Unit)	Engine Oil Capacity	Quarts or liters of oil engine holds. Enter numerical amount of oil capacity in capacity sub-field. If oil capacity is measured in quarts, enter 'Q' in unit sub-field. If oil capacity is measured in liters, enter 'L' in unit sub-field.
Transmission Fluid (Capacity and Unit)	Transmission Fluid Capacity	Quarts or liters of fluid the transmission holds. Enter numerical amount of transmission fluid capacity in capacity sub-field. If transmission fluid capacity is measured in quarts, enter 'Q' in unit sub-field. If transmission fluid capacity is measured in liters, enter 'L' in unit sub-field.
Fuel (Capacity and Unit)	Fuel Capacity	Maximum number of gallons (or gallon equivalents) or fuel the vehicle is capable of carrying. Include auxiliary tanks only if used for standard operation of the vehicle. Enter numerical amount of fuel capacity in capacity sub-field. Enter 'G' in unit sub-field if fuel measured in gallons. Enter 'GE' in sub-field if fuel measured in gallon equivalents.

Specifications – Component Warranties

Data → Equipment Units → Specifications (Component Warranties tab)

In order to track **component warranties** for a vehicle, the following fields on this tab must be completed:

- Component type
- Vendor ID
- Warranty deductible
- Duration (months)
- Duration (meter units)
- Current expiration date
- Current expiration meter

The equipment component that is under warranty must be associated with the Equipment Unit.

The screenshot shows a software window titled "Fleet Management - [Equipment - Specifications]". The window has a menu bar (File, Edit, Action, Data, Queries/Reports, System Mgmt, View, Preferences, Window, Help) and a toolbar with various icons. Below the toolbar is a table with columns: Row, Equipment ID, Quantity of axles, Cab axle length, Wheelbase, Frame section modulus, Sheave height, Insurance data, and Pain. Below this table is a tabbed interface with tabs: Basic Info, Weights, Capacities, **Component Warranties** (selected), and Special Equipment. The **Component Warranties** tab contains an "Equipment ID" field with a dropdown arrow. Below this is a table with columns: Row, Delete, Component type, Vendor ID, Warranty deductible, Duration (months), and Duration (meter units). The status bar at the bottom shows "Ready" and "Rec: ____ of ____".



Specifications – Special Equipment

Data → Equipment Units → Specifications (Special Equipment tab)

Fleet Management - [Equipment - Specifications]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Equipment ID: [Text Field]

Row	Equipment ID	Quantity of axles	Cab axle length	Wheelbase	Frame section modulus	Sheave height	Insurance data	Pain
-----	--------------	-------------------	-----------------	-----------	-----------------------	---------------	----------------	------

Basic Info Weights Capacities Component Warranties **Special Equipment**

Equipment ID: [Text Field]

Row	Delete	Type	Manufacturer	Model	Size	Part number
-----	--------	------	--------------	-------	------	-------------

Ready Rec: ___ of ___

The purpose of the **Special Equipment** tab is to define information about the special equipment associated with or mounted on an equipment unit.

Adding a New Part

This section describes how to enter a new Part ID record in MAXIMUS FleetFocus FA. To complete a parts record you will need to enter data into the following four screens:

- **Parts Primary Information** - *To enter basic information about the part.*
- **Parts Location Information** - *To enter location specific information (bin, unit of measure).*
- **Parts Adjustments** - *To enter starting inventory level and price.*
- **Vendor/Part Information** - *To specify general information about the vendors of the part.*

Note: New Part ID records can also be created automatically using the MAXIMUS FleetFocus FA Quick Orders screen

Parts Primary Information

Data → *Parts Items* → *Primary Information*

1. Click here to **Prepare for Insert**.

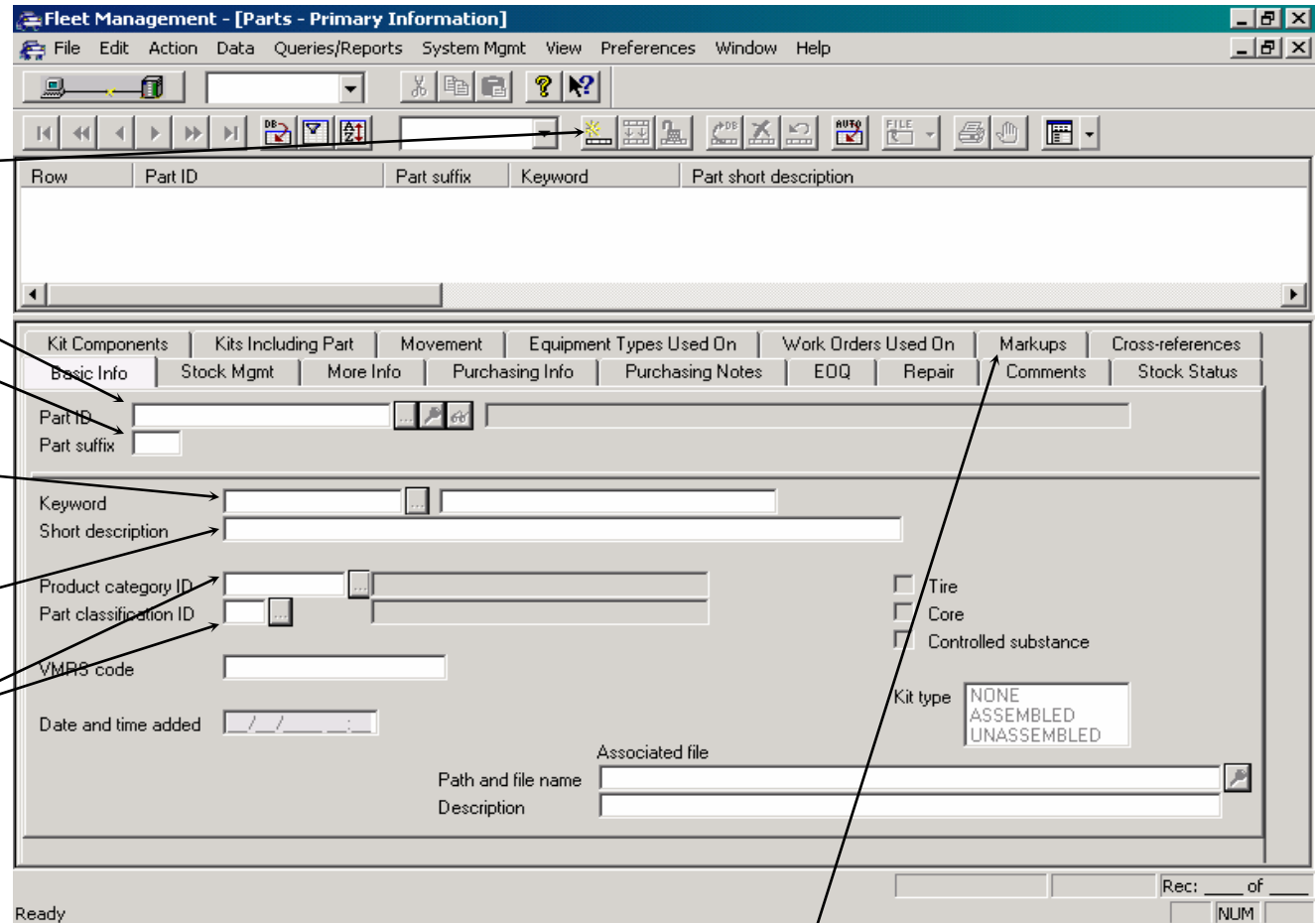
2. Enter the **Part ID**.

3. Enter "0" in the **Part suffix**.

4. Enter a single descriptive term as a **Keyword** (ex: Filter).

5. Enter a full part description as **Short Description**.

6. Enter -- as both **Product Category** and **Part Classification**.



Click on the **Markup** tab (continued on the next page).

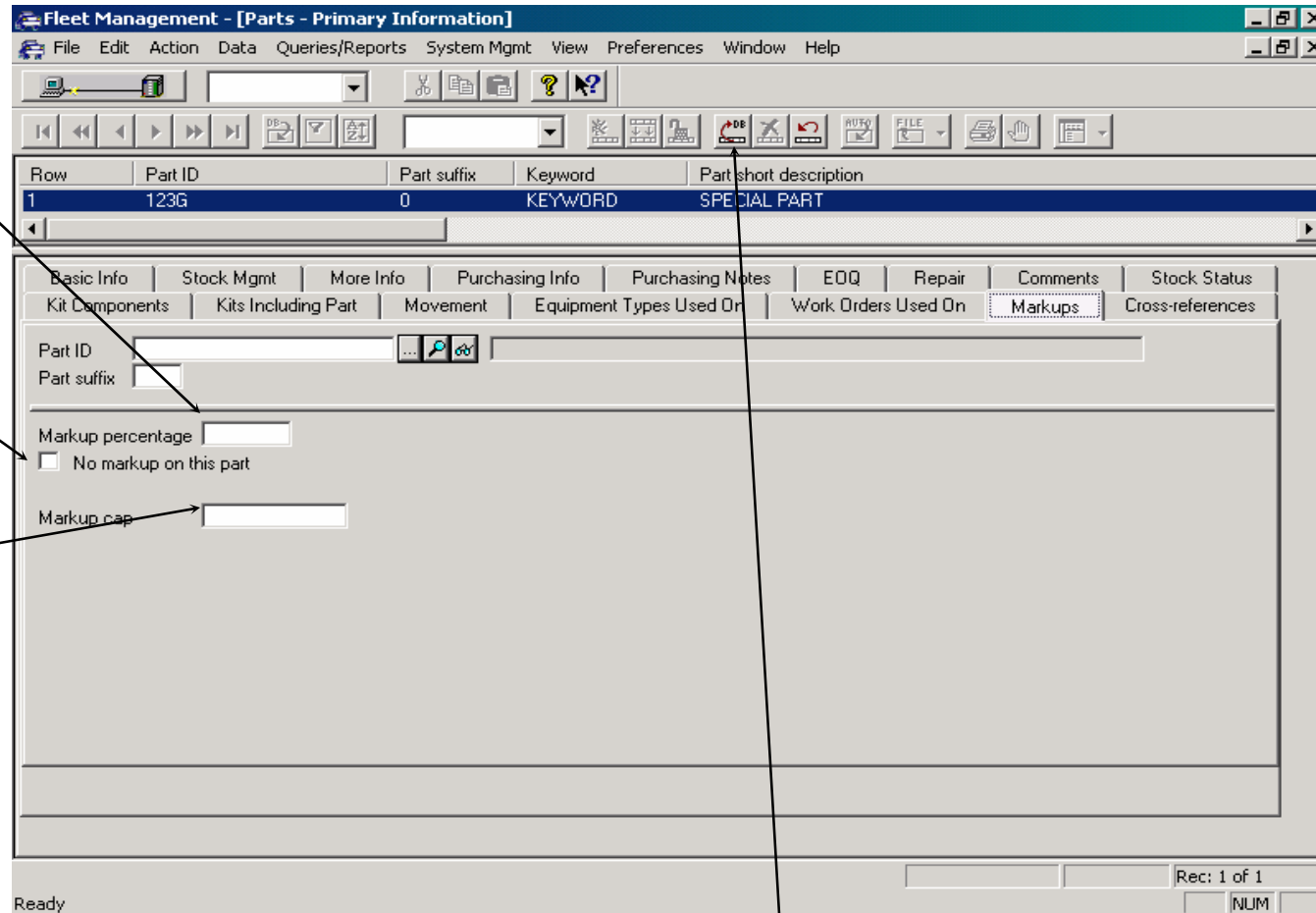
Parts Primary Information (continued)

Data → *Parts Items* → *Primary Information*

7. Enter the **Markup percentage** (e.g. 30)

8. Check **No markup on this part** when no markup applied to this part.

9. Enter the **Markup cap** (e.g. 300).



Row	Part ID	Part suffix	Keyword	Part short description
1	123G	0	KEYWORD	SPECIAL PART

Basic Info | Stock Mgmt | More Info | Purchasing Info | Purchasing Notes | EOQ | Repair | Comments | Stock Status | Kit Components | Kits Including Part | Movement | Equipment Types Used On | Work Orders Used On | **Markups** | Cross-references

Part ID: Part suffix:

Markup percentage:

☐ No markup on this part

Markup cap:

Ready Rec: 1 of 1
NUM

11. Click here to **Process**.

Parts Location Information

Data → **Parts Items** → **Location Information**

1. Click here to **Prepare for Insert**.

2. Enter the **Part ID**.

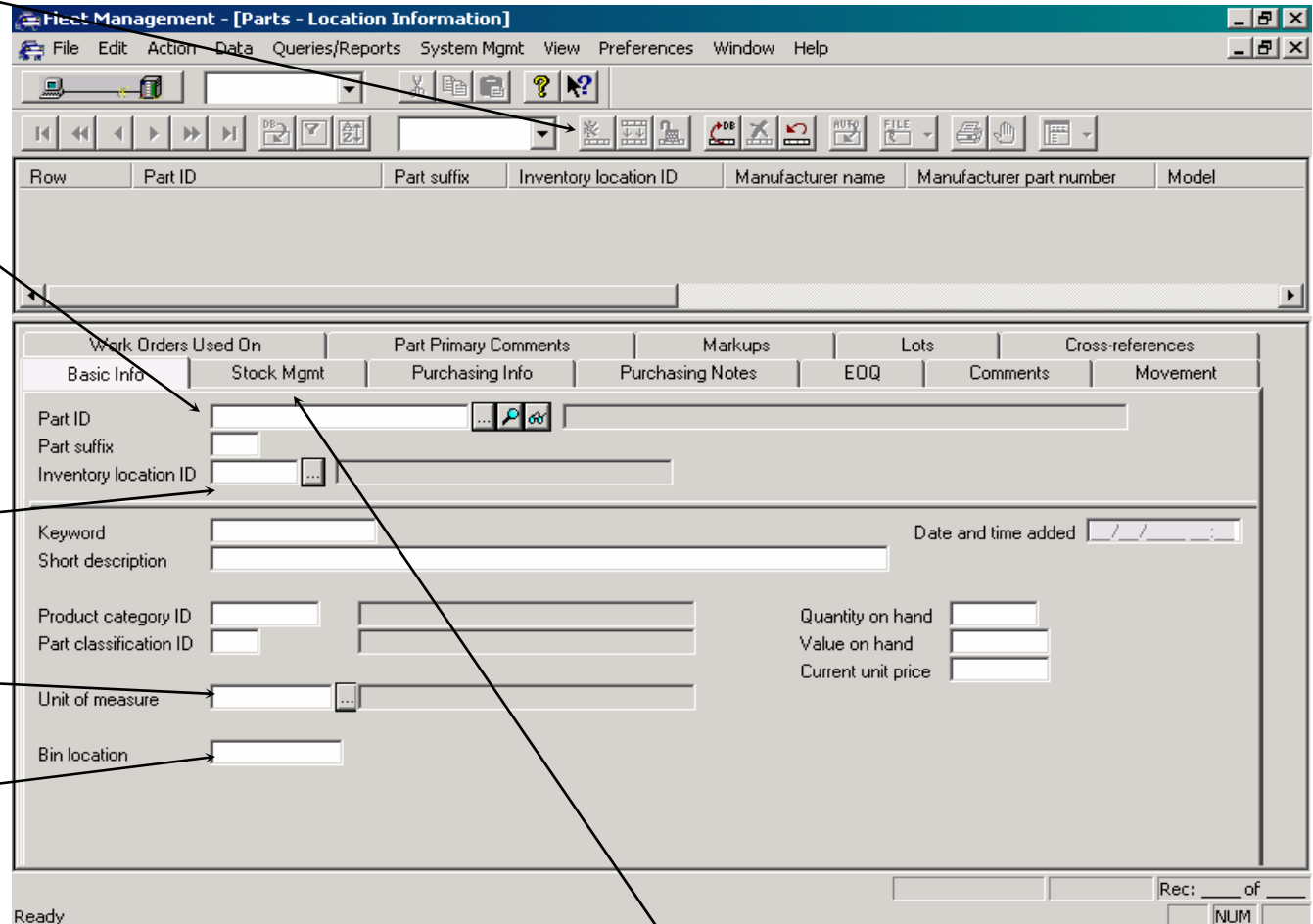
MAXIMUS FleetFocus FA automatically displays:

- *Part Suffix*
- *Keyword*
- *Short Description*
- *Product Category ID*
- *Part Classification ID*

3. Enter Station Location as an **Inventory Location ID** (EX: 8360P).

4. Select the **Unit of Measure** from the choice list.

5. Enter the **Bin location**.



Fleet Management - [Parts - Location Information]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Row Part ID Part suffix Inventory location ID Manufacturer name Manufacturer part number Model

Work Orders Used On Part Primary Comments Markups Lots Cross-references

Basic Info Stock Mgmt Purchasing Info Purchasing Notes EOQ Comments Movement

Part ID
Part suffix
Inventory location ID
Keyword
Short description
Product category ID
Part classification ID
Unit of measure
Bin location
Quantity on hand
Value on hand
Current unit price
Date and time added

Ready Rec: ____ of ____ NUM

Click on the **Stock Management** tab (continued on the next page).

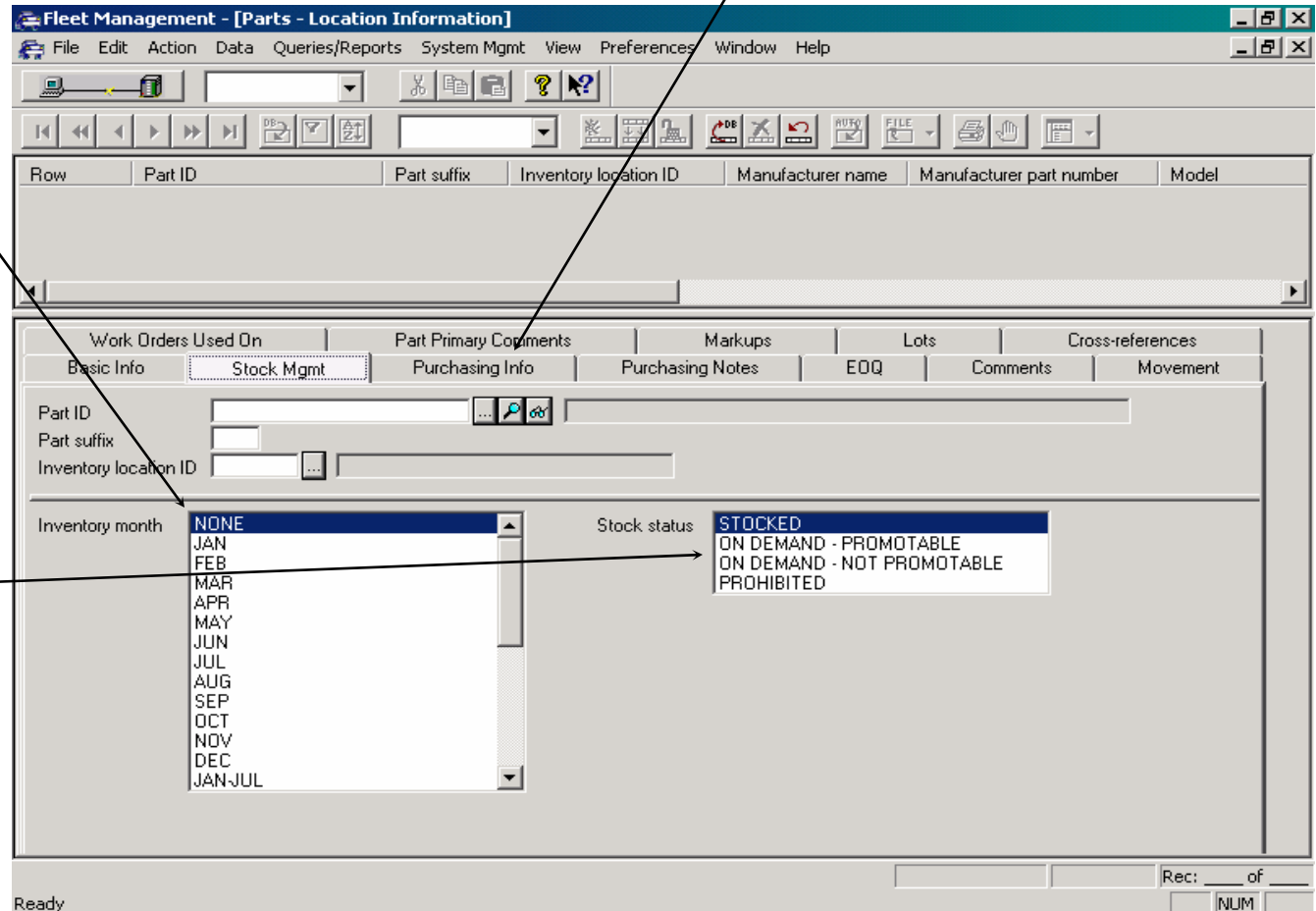
Parts Location Information (continued)

Data → Parts Items → Location Information

Click on the **Purchasing Info** tab (continued on the next page).

6. Enter **Inventory month** from chose list when inventory will be counted. For a stocked part select **ALL** and for good on demand part select **NONE**.

7. Select default **Stock Status** from the choice list. Should be **STOCKED** or **ON DEMAND** **PROMOTABLE**.



Fleet Management - [Parts - Location Information]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Row Part ID Part suffix Inventory location ID Manufacturer name Manufacturer part number Model

Work Orders Used On Part Primary Comments Markups Lots Cross-references

Basic Info Stock Mgmt Purchasing Info Purchasing Notes EOQ Comments Movement

Part ID
Part suffix
Inventory location ID

Inventory month
NONE
JAN
FEB
MAR
APR
MAY
JUN
JUL
AUG
SEP
OCT
NOV
DEC
JAN-JUL

Stock status
STOCKED
ON DEMAND - PROMOTABLE
ON DEMAND - NOT PROMOTABLE
PROHIBITED

Ready Rec: ____ of ____ NUM

Parts Location Information (continued)

Data → Parts Items → Location Information

8. Enter
**Manufacturer's
part number.**

9. Select a **Preferred
vendor ID.**

Fleet Management - [Parts - Location Information]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Part ID Part suffix Inventory location ID Manufacturer name Manufacturer part number Model

Work Orders Used On Part Primary Comments Markups Lots Cross-references

Basic Info Stock Mgmt **Purchasing Info** Purchasing Notes EOQ Comments Movement

Part ID
Part suffix
Inventory location ID

Manufacturer name
Manufacturer part number
Model

Preferred vendor ID
Last vendor ID
Last purchase order ID
Last purchase order unit price
Preferred repairer
Last repairer
Last repair purchase order ID
Last repair purchase order unit price

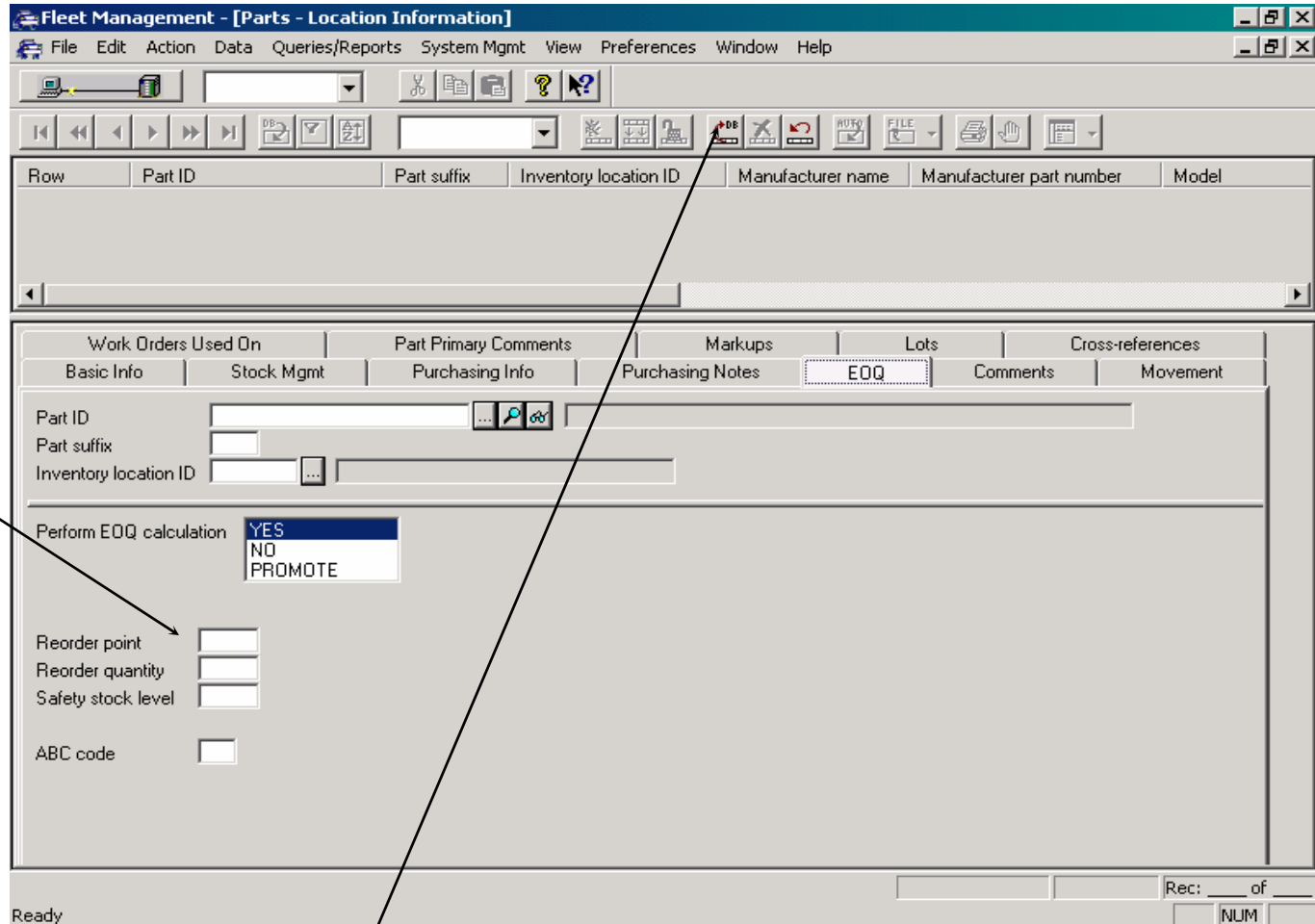
Date
Last receipt price
Date

Rec: ____ of ____
NUM

Click on the **EOQ** tab (continued on the next page).

Parts Location Information (continued)

Data → Parts Items → Location Information



10. Enter the

- **Reorder Point**
- **Reorder Quantity**
- **Safety Stock Level**

11. Click here to **Process**.

Parts Inventory Adjustments

Data → *Parts Activity* → *Adjustments*

Use this screen to adjust inventory counts and unit prices.

1. Click here to **Prepare for Insert**.

2. Enter the **Part ID**.

3. Enter "0" in the **Part suffix**.

4. Enter Station Location as an **Inventory Location ID (EX: 8360P)**.

5. Select desired **Action**.

6. Select **Adjustment type** associated with Action selected.]

7. Based on Action and Adjustment type enter
- Quantity
- Unit Price
- Value

8. Click here to process.

Vendor/Part Information

Data → *Purchasing* → *Vendor/Part Information*

Click on the **Warranty** tab (continued on the next page).

1. Retrieve the (vendor/part) record by filtering on the **Vendor ID** and **Part ID**.

2. Click here to unlock the record.

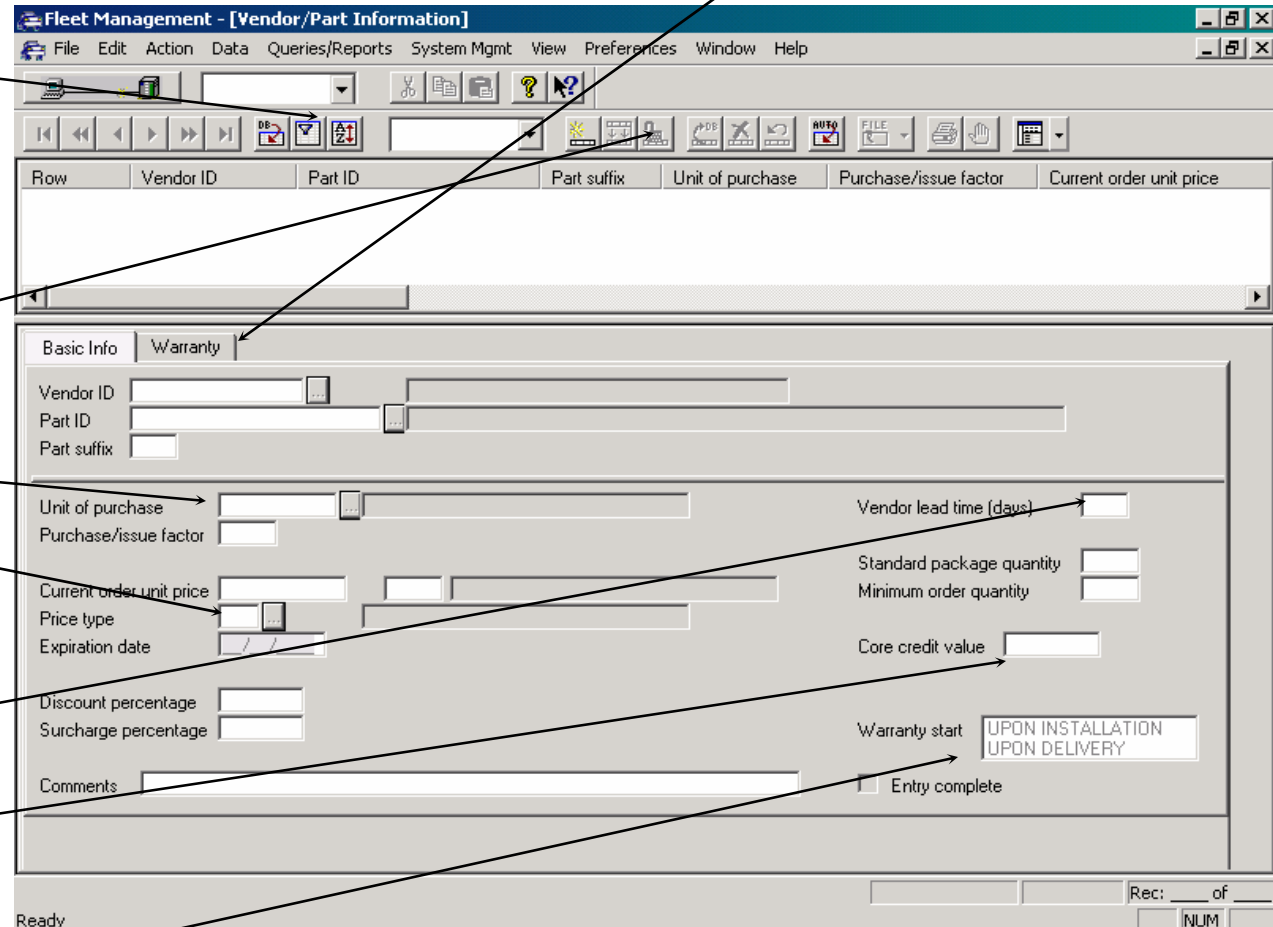
3. Enter the **Unit of purchase**.

4. Enter the **Price type**.

5. Enter **Vendor lead time (days)**.

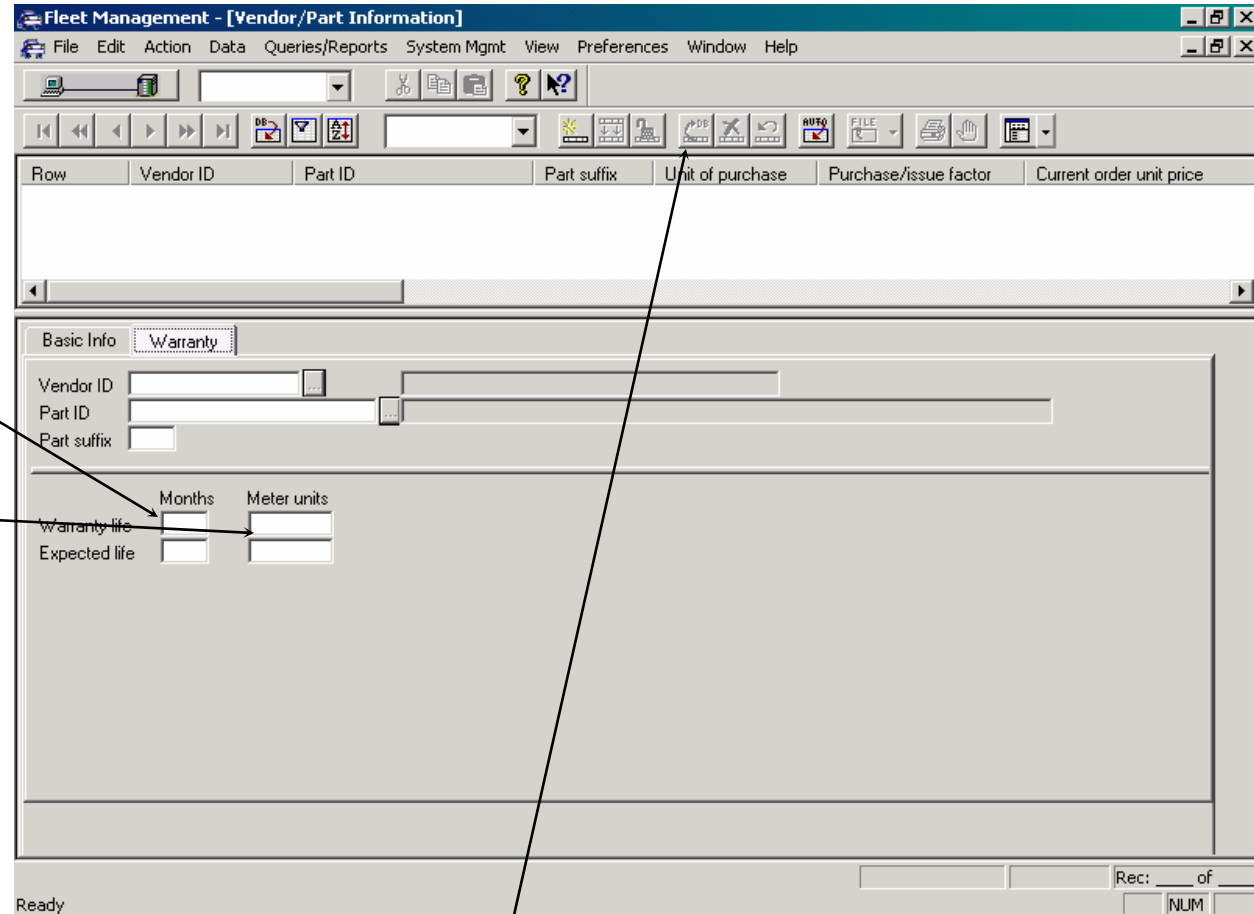
6. Enter **Core credit value** if part has a core.

7. Select **Warranty start** if part is warrantable.



Vendor/Part Information (*continued*)

Data → *Purchasing* → *Vendor/Part Information*



9. Enter **Warranty life**
(Meter units).

10. Enter **Warranty Life**
(Months).

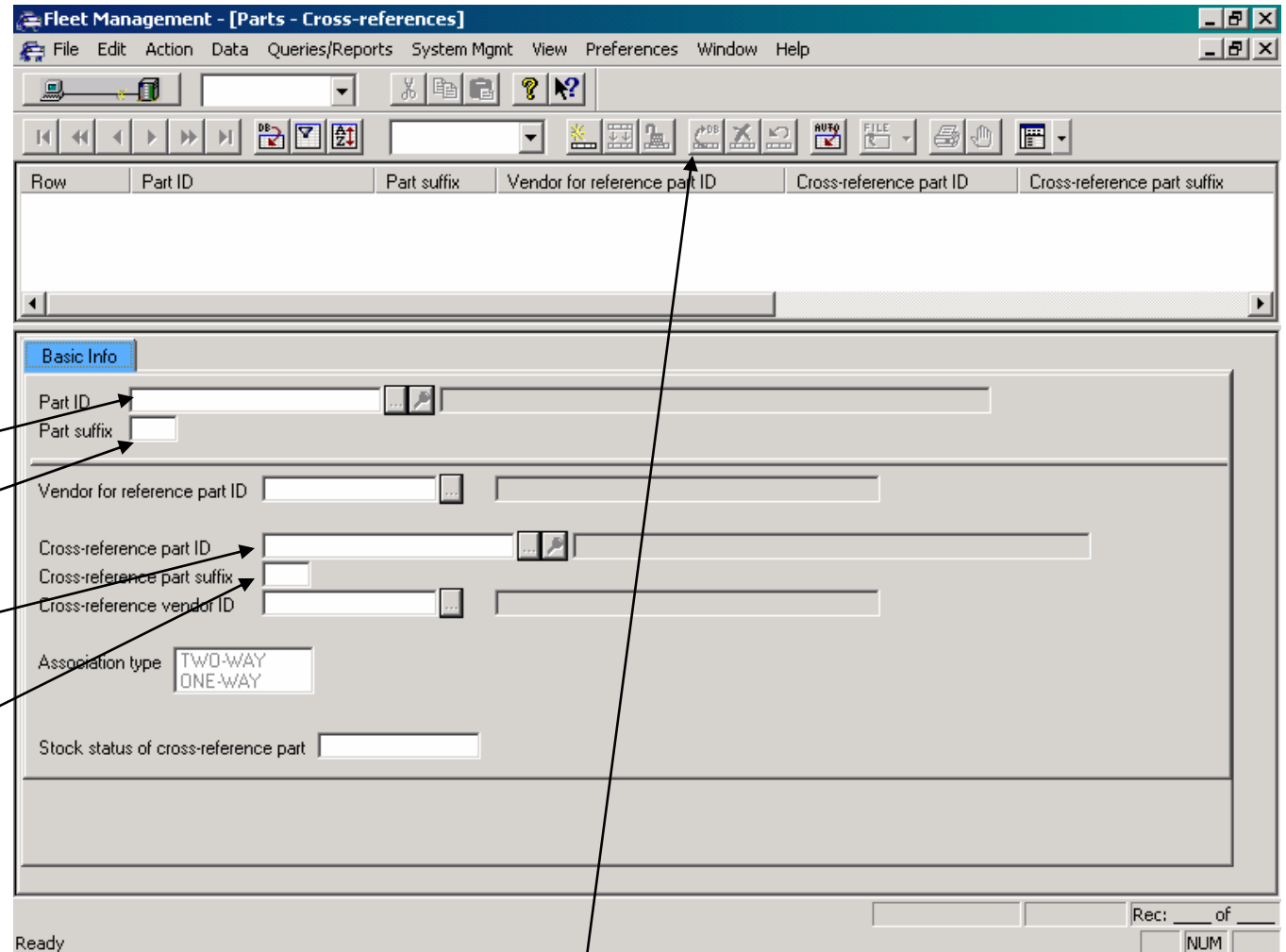
11. Click here to process.

Parts Cross-reference

Data → *Parts Items* → *Cross-references*

Use this screen to quickly and easily set up cross references between like parts from different manufacturers.

1. Enter **Part ID** (part number as it is defined in FA).
2. Enter **Part suffix** for part number as defined in FA.
3. Enter **Cross-reference part ID** (another part ID for Part ID entered).
4. Enter **Cross-reference part suffix**.



Fleet Management - [Parts - Cross-references]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Row	Part ID	Part suffix	Vendor for reference part ID	Cross-reference part ID	Cross-reference part suffix

Basic Info

Part ID

Part suffix

Vendor for reference part ID

Cross-reference part ID

Cross-reference part suffix

Cross-reference vendor ID

Association type

Stock status of cross-reference part

Ready

Rec: ___ of ___

NUM

5. Click here to **Process**.



Warranty

Section IV



Section IV Contents

Topic		Page
1.	Setting up Component Warranties	101
2.	Setting up Warranty Claims	109
3.	Component Warranty Claims	110
4.	Bumper to Bumper Warranty Claims	111
5.	Warranty Claims	114



Vendors – Setting up Component Warranties

Data → Purchasing → Setup → Vendors → Primary Information (Functions tab)

The following pages will assist you in setting up the functionality of Component Warranties.

Fleet Management - [Vendors - Primary Information]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Row Vendor ID Name Contact name Phone

Basic Info **Functions** Purchasing Info Locations Services and Repair Groups

Vendor ID

Vendor provides:

- ☐ Equipment
- ☐ Equipment and component warranties
- ☐ Equipment repair and PM (commercial)
- ☐ Parts
- ☐ Parts warranties
- ☐ Parts repair and rebuild
- ☐ Fuel
- ☐ Testing

Ready

Rec: ____ of ____

Each Vendor that provides component warranties must be setup on the **Vendor Primary Information** screen. On the Functions tab of the Vendors screen, check the **Equipment and component warranties** box.



Components – Setting up Component Warranties (continued)

Data → Equipment Units → Setup → Warranty Components

All components that are under warranty on the equipment unit must be defined in the **Warranty Components** screen.

Fleet Management - [Warranty Components]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Warranty component type

Track as a component

Track usage of parent equipment unit

Warranty Components

Warranty component type

☐ Track as a component

☐ Track usage of parent equipment unit

Ready

Rec: ___ of ___



Components – Setting up Component Warranties (continued)

Data → Shop Activity → Setup → Tasks → Primary Information (Related Component tab)

The screenshot shows the 'Fleet Management - [Tasks - Primary Information]' window. The 'Related Component' tab is selected, displaying a 'Task ID' field and a 'Related component for warranty purposes' field. An arrow points from the explanatory text on the left to the 'Related component for warranty purposes' field. The window also features a menu bar (File, Edit, Action, Data, Queries/Reports, System Mgmt, View, Preferences, Window, Help) and a toolbar with various icons. A table with columns 'Row', 'Task ID', 'Description', 'Task type', and 'Inventory rebuild' is visible at the top of the main content area.

Row	Task ID	Description	Task type	Inventory rebuild
-----	---------	-------------	-----------	-------------------

Basic Info | Procedure Info | **Related Component**

Task ID:

Related component for warranty purposes:

Ready

Rec: ___ of ___

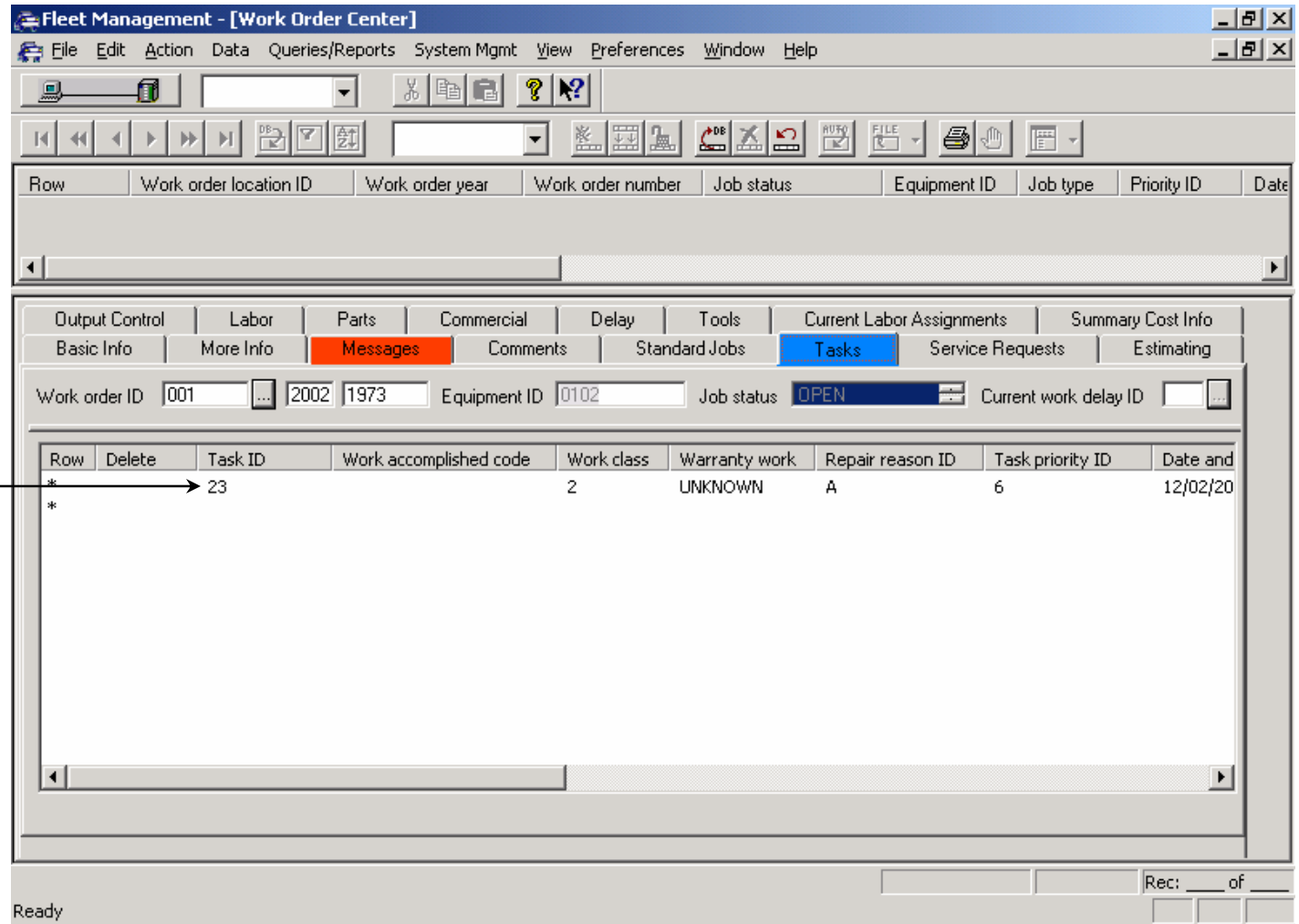
To link expected tasks on a work order to components set up on equipment units, the repair task or repair group must have a Related component for warranty purposes.

This linkage is what activates the component warranty tracking for equipment units on work orders.

Usage – Setting up Component Warranties (continued)

Data → Shop Activity → Work Order Center (Tasks tab)

Open a work order for an equipment unit that has a component warranty defined. Enter the Repair Group or Task ID associated with the component warranty in the **Task ID** field on **Tasks** tab.



Row	Delete	Task ID	Work accomplished code	Work class	Warranty work	Repair reason ID	Task priority ID	Date and
*		23		2	UNKNOWN	A	6	12/02/20
*								

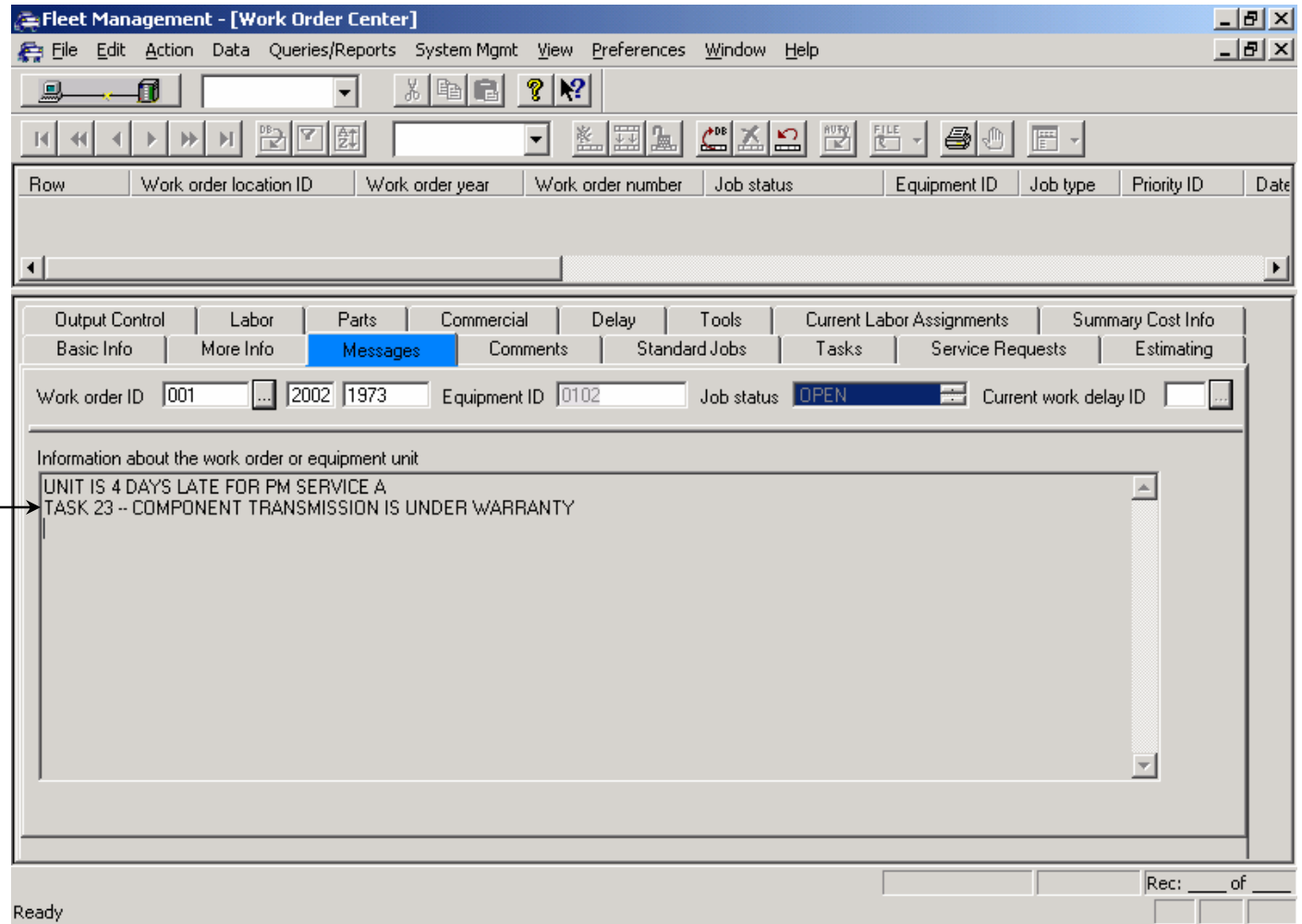
Ready

Usage – Setting up Component Warranties (continued)

Data → Shop Activity → Work Order Center (Messages tab)

If the Equipment unit has a warranty component defined and the task ID entered is associated with a component warranty, this message will display in the **Messages** tab of the **Work Order Center** screen.

NOTE: This information will print on the work order



Fleet Management - [Work Order Center]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Row Work order location ID Work order year Work order number Job status Equipment ID Job type Priority ID Date

Output Control Labor Parts Commercial Delay Tools Current Labor Assignments Summary Cost Info

Basic Info More Info **Messages** Comments Standard Jobs Tasks Service Requests Estimating

Work order ID 001 2002 1973 Equipment ID 0102 Job status OPEN Current work delay ID

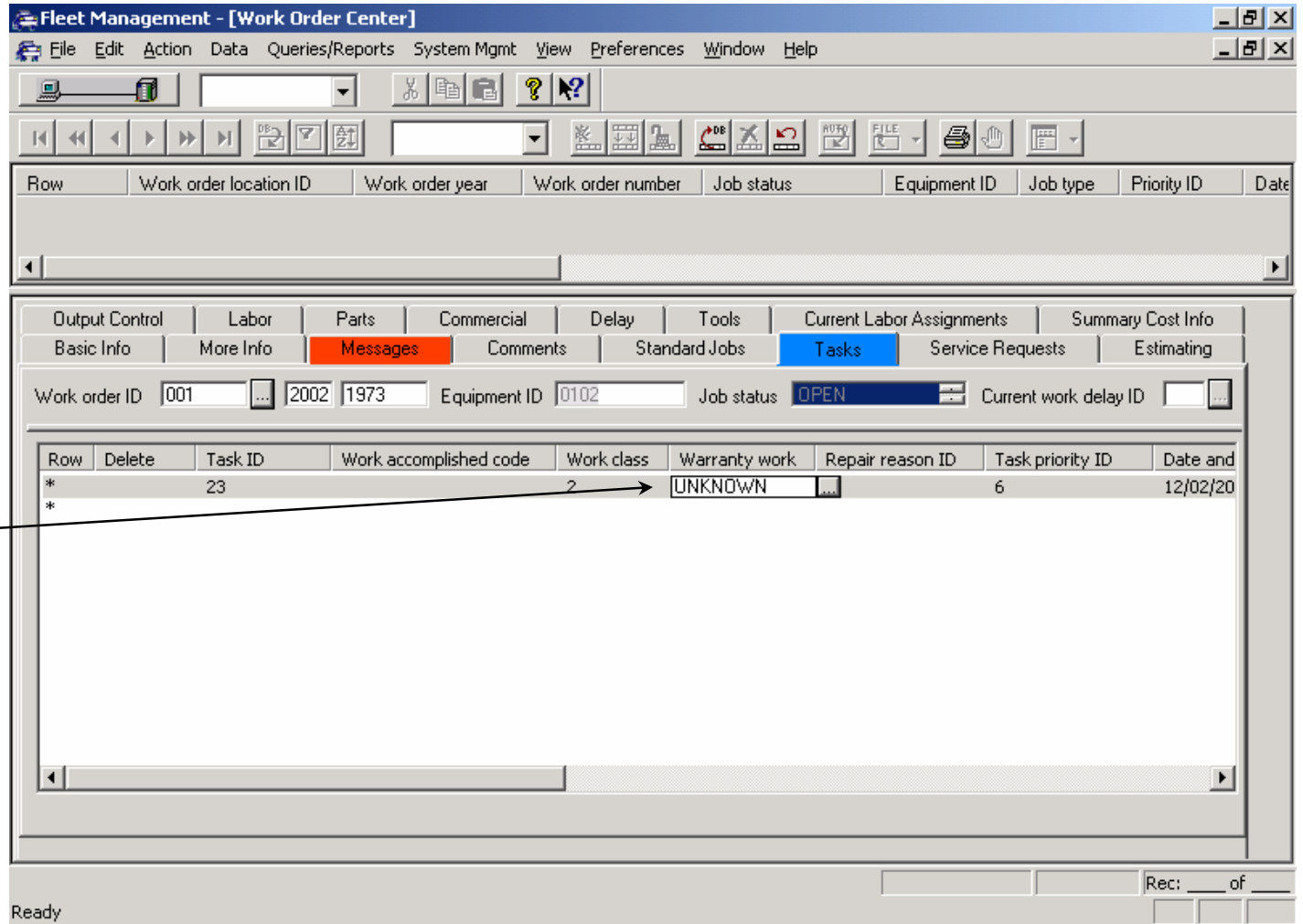
Information about the work order or equipment unit

UNIT IS 4 DAYS LATE FOR PM SERVICE A
TASK 23 -- COMPONENT TRANSMISSION IS UNDER WARRANTY

Ready Rec: ____ of ____

Usage – Setting up Component Warranties (continued)

Data → Shop Activity → Work Order Center (Tasks tab)



Fleet Management - [Work Order Center]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Row Work order location ID Work order year Work order number Job status Equipment ID Job type Priority ID Date

Output Control Labor Parts Commercial Delay Tools Current Labor Assignments Summary Cost Info

Basic Info More Info **Messages** Comments Standard Jobs **Tasks** Service Requests Estimating

Work order ID 001 2002 1973 Equipment ID 0102 Job status OPEN Current work delay ID

Row	Delete	Task ID	Work accomplished code	Work class	Warranty work	Repair reason ID	Task priority ID	Date and
*		23		2	UNKNOWN		6	12/02/20
*								

Ready Rec: of

To flag the Work Order for the Component Warranty Work, set the **Warranty work** field on the Tasks tab from UNKNOWN to YES.

Usage – Setting up Component Warranties (continued)

Data → Shop Activity → Work Order Center

Fleet Management - [Work Order Center]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Row Work order location ID Work order year Work order number Job status Equipment ID Job type Priority ID Date

1	001	2002	1973	CLOSED	0102	REPAIR	6	11/2
---	-----	------	------	--------	------	--------	---	------

Output Control Labor Parts Commercial Delay Tools Current Labor Assignments Summary Cost Info

Basic Info More Info Messages Comments Standard Jobs Tasks Service Requests Estimating

Work Order Messages

Message

Cannot close work order -- task ID 23 has warranty UNKNOWN - PR-ER... 196

OK

Repair site 01 FACILITY PM scheduled / / : : User downtime end 11/27/2002 06:22

Work class 2 NON-SCHEDULED

Warranty work UNKNOWN YES NO

Estimate Approved

Date and time finished 11/27/2002 06:21

Date and time closed 11/27/2002 06:21

Date and time in service 11/27/2002 06:21

Rec: 1 of 1

Ready

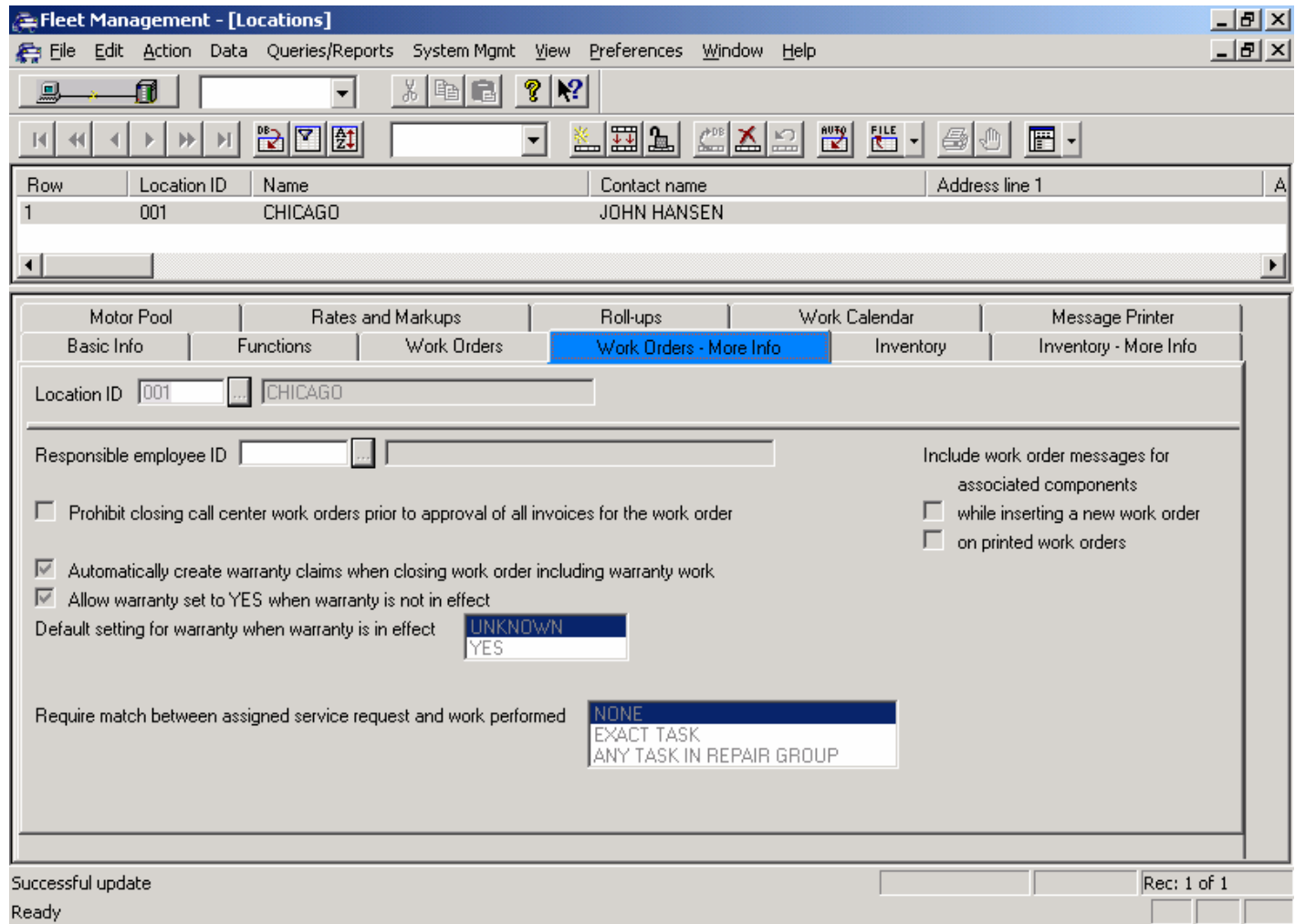
This message will display when closing a Work Order with an associated component warranty if the **Warranty work** field is set to UNKNOWN.

Setting up Warranty Claims

Data → Setup → Organizational Structure → Locations (Work Orders – More Info tab)

To automatically create an Equipment Warranty Claim for component warranty work or Bumper to Bumper work performed on a work order, set the **Automatically create warranty claims when closing work order including warranty work** option on the **Locations** screen.

You cannot specify YES for an equipment unit that is not under warranty unless the work order's location ID has a check in the **Allow warranty set to YES when warranty is not in effect**.



Fleet Management - [Locations]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Motor Pool Rates and Markups Roll-ups Work Calendar Message Printer
Basic Info Functions Work Orders **Work Orders - More Info** Inventory Inventory - More Info

Location ID: 001 CHICAGO

Responsible employee ID: []

☐ Prohibit closing call center work orders prior to approval of all invoices for the work order

☒ Automatically create warranty claims when closing work order including warranty work

☒ Allow warranty set to YES when warranty is not in effect

Default setting for warranty when warranty is in effect: UNKNOWN YES

Require match between assigned service request and work performed: NONE EXACT TASK ANY TASK IN REPAIR GROUP

Include work order messages for associated components:
☐ while inserting a new work order
☐ on printed work orders

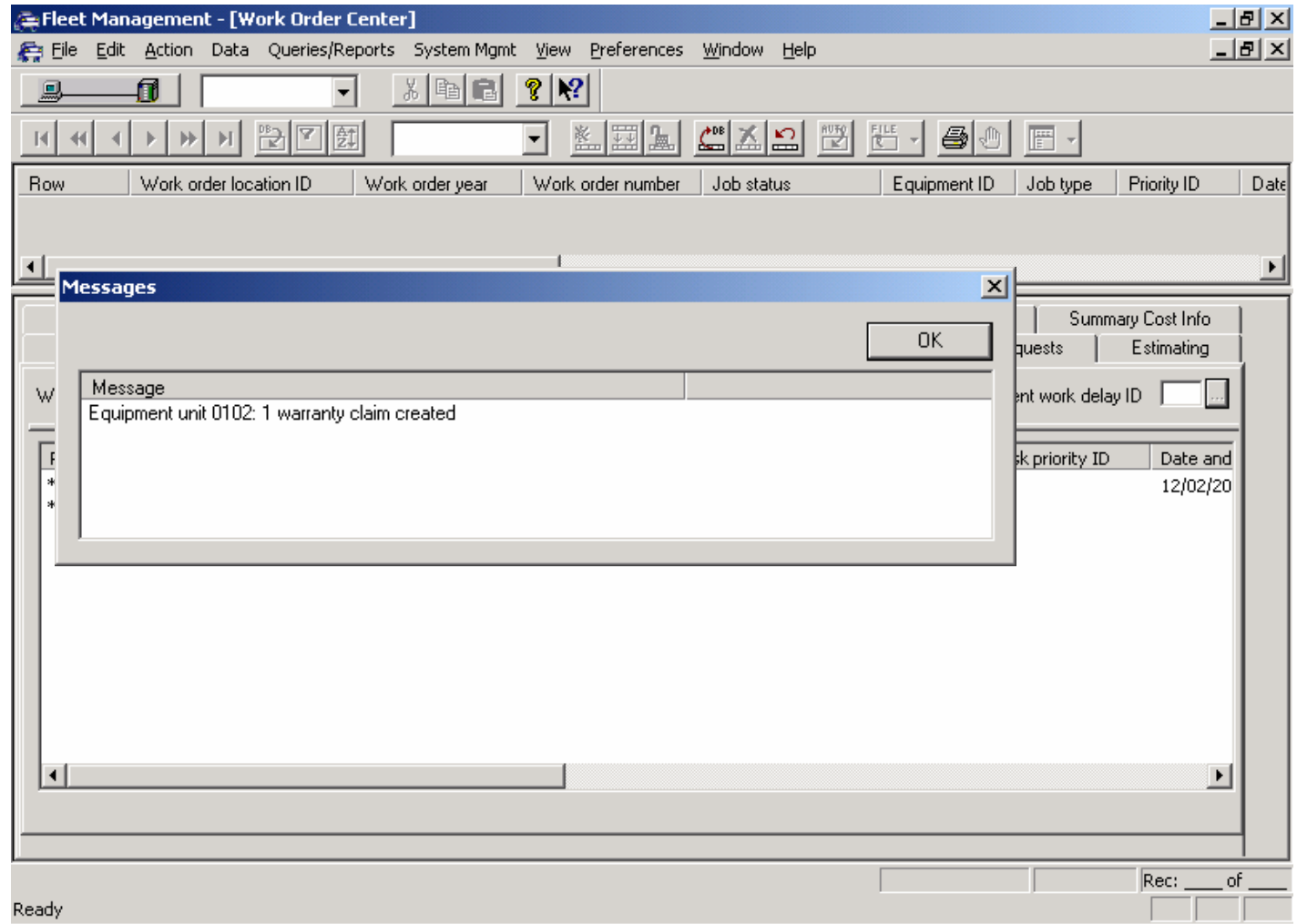
Successful update
Ready

Rec: 1 of 1

Component Warranty Claims

Data → Shop Activity → Work Order Center

Once all work is complete on the Work Order and the Work Order is closed, a warranty claim will automatically be created if the **Automatically create warranty claims when closing work order including warranty work** option is set.





Bumper to Bumper Warranty Claims (continued)

Data → Shop Activity → Work Order Center (Basic Info tab)

If the task on the work order is under the vehicle bumper to bumper parameters, set **Warranty work** to YES.

NOTE: To default the Work Order, Warranty work field to UNKNOWN (if under warranty), set the **Default setting for warranty when warranty is in effect** to UNKNOWN on the **Work Orders – More Info** tab of the **Locations** screen.

Fleet Management - [Work Order Center]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Work order location ID: 001 Work order year: 2002 Work order number: 1977 Job status: OPEN Equipment ID: 0101 Job type: REPAIR Priority ID: 2 Date: 11/27/2002

Output Control Labor Parts Commercial Delay Tools Current Labor Assignments Summary Cost Info

Basic Info More Info Messages Comments Standard Jobs Tasks Service Requests Estimating

Work order ID: 001 2002 1977 Equipment ID: 0101 Job status: OPEN Current work delay ID:

Job type: REPAIR Equipment ID: 0101 License number: 1999 BUI ACC == CURRENT METERS: 1 - 58086; 2 - 0X

Meter 1: 58086 Meter 1 validation: Life meter 1 usage: 58086

Meter 2: 0 Meter 2 validation: Service status:

Account ID: 8011

Priority ID: 2 OUT OF SERVICE 8 HOURS

Tech/vendor:

Repair reason ID: 8 BREAKDOWN PM service:

Repair site: 01 FACILITY PM scheduled:

Work class: 2 NON-SCHEDULED

Warranty work: UNKNOWN YES NO

Estimate: Approved:

Date and time out of service: 11/27/2002 07:24

Date and time in: 11/27/2002 07:24

Date and time due: 11/27/2002 15:24

Date and time opened: 11/27/2002 07:24

Date and time first labor:

Shop downtime begin: 11/27/2002 07:24

Shop downtime end: 11/27/2002 07:26

User downtime begin:

User downtime end:

Date and time finished:

Date and time closed:

Date and time in service:

Ready

Rec: 1 of 1



Bumper to Bumper Warranty Claims (continued)

Data → Shop Activity → Work Order Center

If there are multiple tasks on the Tasks tab, this message will display when closing a Work Order if the **Warranty work** field is set to YES.

NOTE: This message only applies when **Automatically create warranty claims when closing work order including warranty work** option on the **Locations** screen is checked (see page 43).

Mark the Equip warranty work field on the Tasks tab for each task that applies to the warranty work performed under the bumper-to-bumper warranty.

Fleet Management - [Work Order Center]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Work order location ID: 001 Work order year: 2002 Work order number: 1977 Job status: OPEN Equipment ID: 0101 Job type: REPAIR Priority ID: 2 Date: 11/27/20

Output Control Labor Parts Commercial Delay Tools Current Labor Assignments Summary Cost Info

Basic Info More Info Messages Comments Standard Jobs **Tasks** Service Requests Estimating

Work order ID: 001 2002 1977 Equipment ID: 0101 Job status: OPEN Current work delay ID:

Row	Delete	Task ID	Work accomplished code	Work class	Warranty work	Repair reason ID	Task priority ID	Date and
1		01-01		2	NO	B	2	11/27/20
2		13		2	NO	B	2	11/27/20
*								

Messages

Message

Multiple possible tasks for warranty claims -- Mark warranty tasks under Equip warranty work on Tasks tab - PR-EF 196

OK

Ready

Rec: 1 of 1

Bumper to Bumper Warranty Claims (continued)

Data → Shop Activity → Work Order Center

Once all work is complete on the Work Order and the Work Order is closed, a Warranty Claim will automatically be created if the optional **Automatically create warranty claims when closing work order including warranty work** is set.

Fleet Management - [Work Order Center]
File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Row	Work order location ID	Work order year	Work order number	Job status	Equipment ID	Job type	Priority ID	Date
1	001	2002	1977	CLOSED	0101	REPAIR	2	11/2

Output Control Labor Parts Commercial Delay Tools Current Labor Assignments Summary Cost Info
Basic Info More Info Messages Comments Standard Jobs **Tasks** Service Requests Estimating

Work order ID Equipment ID Job status Current work delay ID

Row	Delete	Task ID	Work accomplished code	Work class	Warranty work	Repair reason ID	Task priority ID	Date and
1		01-01		2	NO	B	2	11/27/20
2		13		2	NO	B	2	11/27/20

Messages

OK

Message
Equipment unit 0101: 1 warranty claim created

Successful update

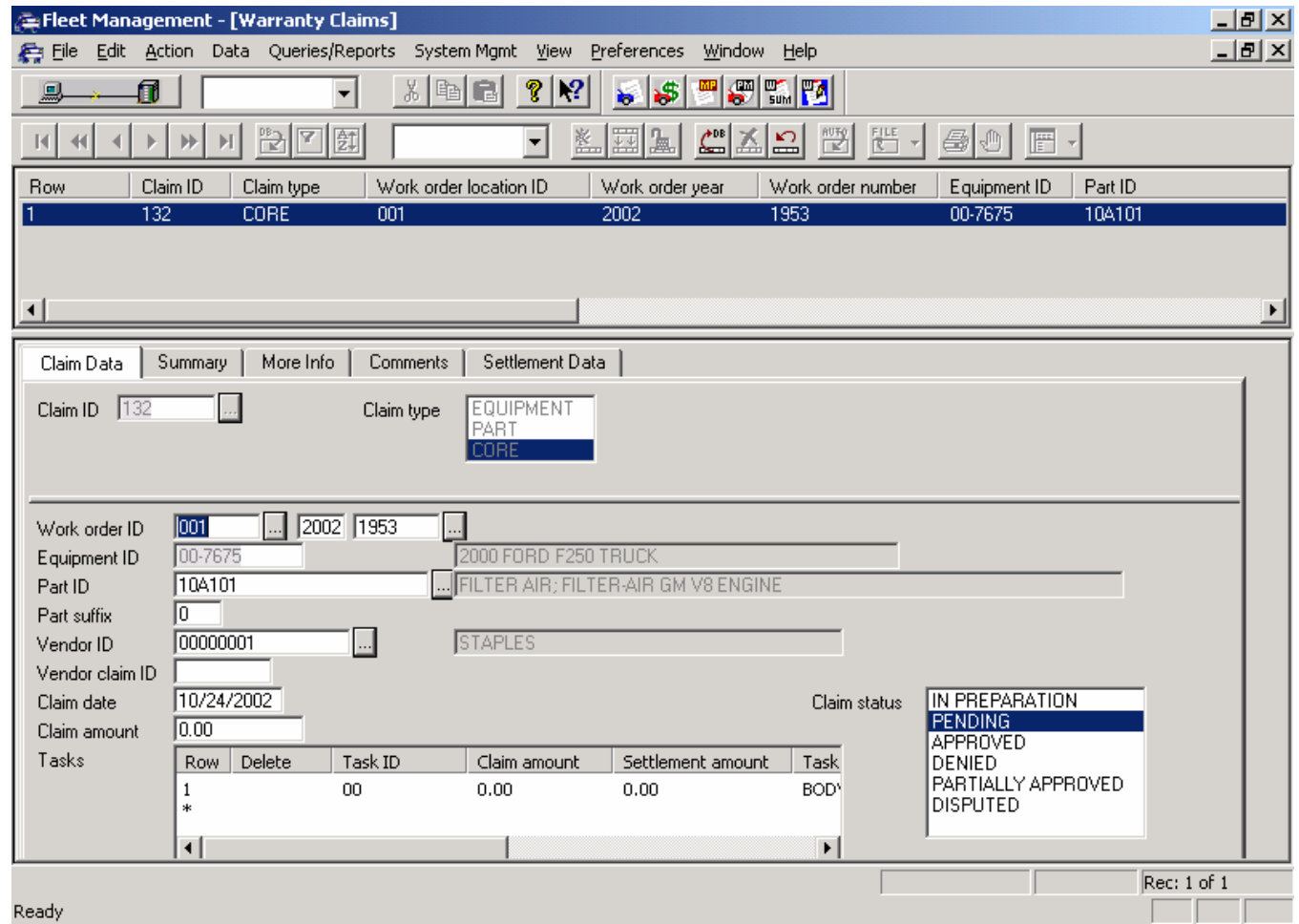
Ready

Rec: 1 of 1

Warranty Claims

Data → *Parts Activity* → *Warranty Claims (Claim Data tab)*

The purpose of the **Warranty Claims** screen is to define and update warranty claims made to vendors or manufacturers in order to recover costs related the return of core parts and equipment/parts warranties.



Fleet Management - [Warranty Claims]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Row	Claim ID	Claim type	Work order location ID	Work order year	Work order number	Equipment ID	Part ID
1	132	CORE	001	2002	1953	00-7675	10A101

Claim Data Summary More Info Comments Settlement Data

Claim ID: 132 Claim type: EQUIPMENT PART CORE

Work order ID: 001 2002 1953

Equipment ID: 00-7675 2000 FORD F250 TRUCK

Part ID: 10A101 FILTER AIR; FILTER-AIR GM V8 ENGINE

Part suffix: 0

Vendor ID: 00000001 STAPLES

Vendor claim ID:

Claim date: 10/24/2002

Claim amount: 0.00

Claim status: IN PREPARATION PENDING APPROVED DENIED PARTIALLY APPROVED DISPUTED

Row	Delete	Task ID	Claim amount	Settlement amount	Task
1		00	0.00	0.00	BOD
*					

Ready

Rec: 1 of 1

Warranty Claims

Data → *Parts Activity* → *Warranty Claims (Settlement Data tab)*

Once the vendor has fully or partially paid the claim, set the **Claim status** field on the Claim Data tab to either APPROVED or PARTIALLY APPROVED, and enter the **Settlement date** and **Settlement amount** on the **Settlement Data** tab.

Fleet Management - [Warranty Claims]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Row Claim ID Claim type Work order location ID Work order year Work order number Equipment ID Part ID

1	132	CORE	001	2002	1953	00-7675	10A101
---	-----	------	-----	------	------	---------	--------

Claim Data Summary More Info Comments Settlement Data

Claim ID Claim type

Settlement date
Settlement amount
Tax amount
Freight amount

Ready Rec: 1 of 1



Data Entry/Maintenance

Section V



Section V Contents

Topic	Page
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2. Fueling – External and Internal Fuel Tickets	119
3. Meter Readings-Assignments-Usage	125
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b) Posting Parts	144
c) Posting Commercial	146
d) Closing a Work Order	149



Fuel/Fluid Tanks

Data → *Fuel/Fluid Tanks* → *Primary Information*

1. Click here to **Insert** a new record

2. Give the Fuel/Fluid Tank and unique **Tank ID**

3. Select a **Location ID** from the list provided.

4. Choose the **Fuel/Fluid type** that will go in this tank.

5. Enter total **Tank Capacity**.

6. Enter **Reorder Point** to enable automated reordering.

7. Select **Preferred Vendor ID** from the list provided to enable automated reordering.

8. **Process** the record

FleetFocus - [Fuel/Fluid Tanks - Primary Information]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Row Tank ID Location ID Fuel/fluid type Quantity on hand Current price Value on hand Reorder point Quantity on order Value on order Tank capacity Pre

Basic Info CNG Current Inventory Last Tank Reading Movement

Tank ID

Location ID

Fuel/fluid type

Tank capacity

Reorder point

Preferred vendor ID

☐ Underground tank Underground account

Ready

Rec: of



Fueling – External Fuel Tickets

Data —→ *Equipment Activity* —→ *Fueling* —→ *External Fuel Tickets*

FleetFocus - [External Fuel Tickets]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Row

External Fuel Ticket Entry

External fuel tickets

Row	Equipment ID	Transaction date	License number	Year - manufacturer - model - meter readings

Meter 1 reading	Meter 1 validation	Meter 2 reading	Meter 2 validation	Reversal	Fuel type	Fuel qty	Fuel cost

Fluid type	Fluid qty	Fluid cost	Misc cost	Account ID	Back out fuel tax

State or province	Employee/operator ID	Vendor ID	Currency ID	Comments

Ready

Rec: ____ of ____
NUM



Fueling – External Fuel Tickets

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Fuel Type	Fuel Type Used	Type of fuel purchased. Select appropriate fuel type from choice list provided: BDL – Biodiesel CNG – Compressed Natural Gas DSL – Diesel ELE – Electricity ETH – Ethanol GAS – Gasoline LPG – Propane MET - Methanol
Fuel Quantity	Fuel Quantity	Enter quantity of fuel purchased in gallons or gallon equivalents.
Fuel Cost	Fuel Cost	Total cost of fuel purchased. Enter cost of fuel purchased for external fuel tickets only.



Fueling – External Fuel Tickets

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Fluid Type	Incidental Lubricants	Lubricants used during preventative maintenance and repairs, such as engine oil, transmission fluid and brake fluid. Select appropriate fluid type from choice list provided: Engine Oil Auto Trans Fluid Antifreeze Brake Fluid Gear Oil Air Cond Fluid
Fluid Quantity	Incidental Lubricant Quantity	Quantity of lubricants used during preventative maintenance and repair work. Enter fluid quantity purchased.
Fluid Cost (External Fuel Tickets)	Incidental Lubricants Cost	Cost of lubricants used during preventative maintenance and repair work. Enter cost of fluids purchased for external tickets.



Fueling – Internal Fuel Tickets

Data —→ *Equipment Activity* —→ *Fueling* —→ *Internal Fuel Tickets*

FleetFocus - [Internal Fuel Tickets]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Internal Fuel Ticket Entry

Internal fuel tickets

Row	Equipment ID	Transaction date	License number	Year - Manufacturer - Model - Meter readings

Meter 1 reading	Meter 1 validation	Meter 2 reading	Meter 2 validation	Reversal	Tank ID

Fuel/fluid type	Qty	Fluid ID	Location ID	Fluid qty	Misc cost	Account ID	Employee/operator ID

Ready

Rec: ___ of ___



Fueling – Internal Fuel Tickets

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Fuel Type	Fuel Type Used	Type of fuel purchased. Select appropriate fuel type from choice list provided: BDL – Biodiesel CNG – Compressed Natural Gas DSL – Diesel ELE – Electricity ETH – Ethanol GAS – Gasoline LPG – Propane MET - Methanol
Fuel Quantity	Fuel Quantity	Enter quantity of fuel purchased in gallons or gallon equivalents.



Fueling – Internal Fuel Tickets

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Fluid Type	Incidental Lubricants	Lubricants used during preventative maintenance and repairs, such as engine oil, transmission fluid and brake fluid. Select appropriate fluid type from choice list provided: Engine Oil Auto Trans Fluid Antifreeze Brake Fluid Gear Oil Air Cond Fluid
Fluid Quantity	Incidental Lubricant Quantity	Quantity of lubricants used during preventative maintenance and repair work. Enter fluid quantity purchased.
Misc. Cost (Internal Fuel Tickets)	Incidental Lubricants Cost	Cost of lubricants used during preventative maintenance and repair work. Enter cost of fluids, if known, for internal tickets.

Meter Readings – Assignments – Usage

Data → Equipment Units → Usage → Meter Readings – Assignments – Usage (Meter Readings tab)

1. Click here to
Prepare for Insert.

The Date and time entered/displayed here will be the default for each row entered

2. Enter the
Equipment ID.

Current Year, Manufacturer, Model and meter reading display.

End date and time defaults to system date/time.

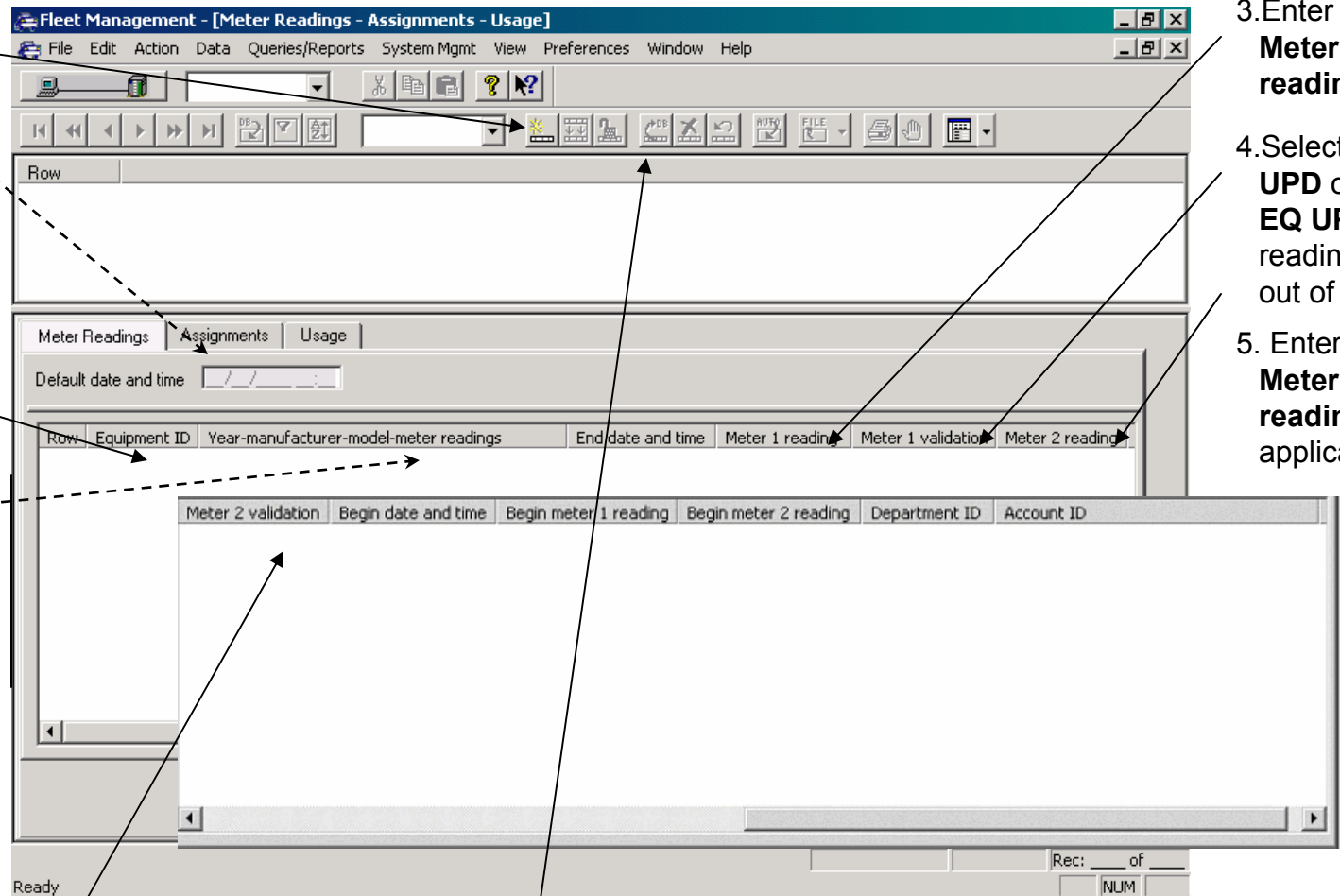
3. Enter the
Meter 1 reading.

4. Select **EQ UPD** or **NO EQ UPD** if reading is out of range

5. Enter the
Meter 2 reading (if applicable).

6. Select **EQ UPD** or **NO EQ UPD** if reading is out of range

7. Click here to **Process.**





Meter Readings – Assignments – Usage

State of Texas Required Fields

Monthly Meter Readings

FleetFocus Field Name	State of Texas Required Data	Definition
End Date and Time	Odometer Reporting Date	Change default date to last day of month being entered.
Meter 1 Reading	Odometer Reading	Enter ending odometer reading.

Vehicle Disposal Meter Readings

FleetFocus Field Name	State of Texas Required Data	Definition
End Date and Time	Date and Time of Vehicle Disposal	Change default date to date of vehicle disposal.
Meter 1 Reading	Odometer Reading at Disposal	Enter odometer reading at time of disposal.



Usage Tickets

Data → **Equipment Activity** → **Usage** → **Usage Tickets**

The purpose of the Usage Tickets screen is to display and insert equipment usage transactions.

5. Click here to **Process**

1. Click here to
Prepare for Insert.

2. Enter the
Equipment ID.

*Transaction Date and
time displayed will default
to the system date and
time*

*Current Year,
Manufacturer, Model
and meter reading
display.*

3. Select **Department
ID** from the choice
list.

4. Enter **Trips** and/or
Passengers

Usage Ticket Entry

Usage ticket entry

Row	Equipment ID	Transaction date	Year - manufacturer - model - meter readings	Department ID
-----	--------------	------------------	--	---------------

Operator ID	Operator name	Meter 1 begin	Meter 1 end	Meter 1 validation	Meter 2 begin	Meter 2 end
-------------	---------------	---------------	-------------	--------------------	---------------	-------------

Meter 2 validation	Begin date and time	End date and time	Trips	Passengers	Reversal	Meter only	Other charges
--------------------	---------------------	-------------------	-------	------------	----------	------------	---------------

Meter only	Other charges	Pool location ID	Account ID	Personal usage	Trip ID
------------	---------------	------------------	------------	----------------	---------

Ready

Rec: ___ of ___



Usage Tickets

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Trips	Number of Trips	<p>Total number of trips vehicle completes during month. Enter the total number of trips completed during the month. Number of passengers can be entered at the same time on the same entry line.</p> <p>The following fields must also be completed to process the record:</p> <p>Equipment ID</p> <p>Transaction Date (should match end of month during which trips occurred.)</p> <p>Department ID</p>
Passengers	Number of Passengers	<p>Number of passengers transported in the vehicle during the month. Enter total number of passengers transported during the month. Number of trips for the month can be entered at the same time on the same entry line.</p> <p>The following fields must also be completed to process the record:</p> <p>Equipment ID</p> <p>Transaction Date (should match end of month during which trips occurred.)</p> <p>Department ID</p>



FleetFocus FA's Work Order Center

Data → Shop Activity → Work Order Center

FleetFocus - [Work Order Center]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Row Work order location ID Work order year Work order number Job status Equipment ID Job type Priority ID Date and time opened Date and time in Da

Output Control Labor Parts Commercial Delay Tools Current Labor Assignments Summary Cost Info

Basic Info More Info Messages Comments Notes Standard Jobs Tasks Service Requests/Defects Estimating

Work order ID Equipment ID Job status OPEN Current work delay ID

Job type REPAIR PM Equipment ID License number Date and time out of service
Date and time in
Meter 1 Meter 1 validation Life meter 1 usage Date and time due
Meter 2 Meter 2 validation Service status Date and time opened
Account ID Date and time first labor
Priority ID Shop downtime begin
Tech/vendor Shop downtime end
Repair reason ID PM service User downtime begin
Repair site PM scheduled User downtime end
Work class Date and time finished
Warranty work UNKNOWN Date and time closed
YES
NO Estimate Approved Date and time in service

Ready Rec: of



Work Order Center Communication

Data → *Shop Activity* → *Work Order Center*

Messages tab:

FleetFocus FA
messages about the
Equipment ID

Comments tab:

Your messages to other
users about the
Work Order

Service Requests tab:

Information from other
users about the
Equipment ID

FleetFocus - [Work Order Center]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Row Work order location ID Work order year Work order number Job status Equipment ID Job type Priority ID Date and time opened Date and time in Date and time out

Output Control Labor Parts Commercial Delay Tools Current Labor Assignments Summary Cost Info

Basic Info More Info Messages Comments Notes Standard Jobs Tasks Service Requests/Defects Estimating

Work order ID Equipment ID Job status OPEN Current work delay ID

Job type REPAIR Equipment ID License number Date and time out of service

Meter 1 Meter 1 validation Life meter 1 usage Date and time in

Meter 2 Meter 2 validation Service status Date and time due

Account ID Date and time opened

Priority ID Date and time first labor

Tech/vendor Shop downtime begin

Repair reason ID Shop downtime end

Repair site User downtime begin

Work class User downtime end

Warranty work UNKNOWN YES NO Date and time finished

PM service Date and time closed

PM scheduled Date and time in service

Estimate Approved

Ready Rec: ___ of ___



Work Order Screens

Work Order Center – This is the most comprehensive work order screen in FA. All data about a work order is displayed on this screen. Use this screen to view existing information about an open work order, or to open work orders. When creating new work orders this screen works best if the work order is open before work begins on the vehicle. No Labor, Parts or Commercial Charges can be posted to a work order on this screen until the work order is processed for the first time.

Work Order Short Form – Use this screen to create work orders after the work has already been completed by technicians or outside vendors. A user can create a work order, add parts labor and commercial transactions, and finish the work order all in a single process.

Parts Issues and Returns – Use this screen to post parts issues to multiple work orders during a single process. Parts can only be issued to OPEN or FINISHED work orders. Any parts issues posted to a work order will be visible on the Work Order Center screen after processing. This screen is commonly used by Parts Warehouse users.

Timecards – Use this screen to post both direct and indirect labor entries to multiple work orders in a single process. Labor transactions can only be posted to OPEN or FINISHED work orders. Any labor transactions associated with a work order will be visible on the Work Order Center screen after processing.

Commercial Work Order Charges – Use this screen to post Commercial Sublet work to OPEN or FINISHED multiple work orders in a single process. Any commercial transactions associated with a work order will be visible on the Work Order Center screen after processing.



Work Order Status

OPEN – *Work Order has been created and the vehicle is in the shop. Labor, Parts, and Commercial transactions can be posted.*

DELAY – *Work Order has been created but is not currently being worked on.*

WORK FINISHED - *Work on the vehicle is complete and can be returned to the customer. Labor, Parts, and Commercial transactions can be posted.*

CLOSED – *All entries and edits to the work order are complete. Work Order is ready to be sent to Billing. Edits are only allowed by System Administrator*



Inserting a New Repair Work Order Using Work Order Center

Data → Shop Activity → Work Order Center

The screenshot shows the 'Fleet Management - [Work Order Center]' application window. It features a menu bar (File, Edit, Action, Data, Queries/Reports, System Mgmt, View, Preferences, Window, Help) and a toolbar with various icons. Below the toolbar is a table with columns: Row, Work order location ID, Work order year, Work order number, Job status, Equipment ID, Job type, Priority ID, and Date. The main area contains several tabs: Basic Info, More Info, Messages, Comments, Tasks, Service Requests, Estimating, Labor, Parts, Commercial, and Delay. The 'Basic Info' tab is active, showing fields for Work order ID (LOC1), Work order year (2002), Equipment ID (16), Job status (OPEN), and Current work delay ID. Below these are fields for Job type (REPAIR), Equipment ID, License number, Date and time out of service, Date and time in (04/23/2002 10:06), Date and time due, Date and time opened (checked, 04/23/2002 10:06), Date and time first labor, Shop downtime begin, Shop downtime end, User downtime begin, User downtime end, Date and time finished, Date and time closed, and Date and time in service. There are also checkboxes for Estimate and Approved. At the bottom, there's a 'Ready' status bar and a 'Rec: of NUM' field.

- Click here to (**Prepare for**) insert a new work order.
- Confirm the work order ID
- Select **REPAIR** as the **Job type**.
- Enter the **Equipment ID**.
- Enter the **Repair reason ID**.
- Enter **Repair site**.
- Enter the **Work class**.
- Check if Work is **Warranty related**
- Ensure that the **dates** are correct
- Review the **Messages** and the **Service Request** tabs.
- Type any text you want to print on the work order hard copy on the **Comments** tab.
- Process the record



Inserting a New PM Work Order Using Work Order Center

Data → Shop Activity → Work Order Center

The screenshot shows the 'Fleet Management - [Work Order Center]' application window. It features a menu bar (File, Edit, Action, Data, Queries/Reports, System Mgmt, View, Preferences, Window, Help) and a toolbar with various icons. Below the toolbar is a table with columns: Row, Work order location ID, Work order year, Work order number, Job status, Equipment ID, Job type, Priority ID, and Date. The main area contains several tabs: Basic Info, More Info, Messages, Comments, Tasks, Service Requests, Estimating, Labor, Parts, Commercial, and Delay. The 'Basic Info' tab is active, showing fields for Work order ID (LOC1), Work order year (2002), Work order number (16), Equipment ID, Job status (OPEN), and Current work delay ID. Below these are sections for Job type (REPAIR, PM), Equipment ID, License number, Date and time out of service, Date and time in (04/23/2002 10:06), Date and time due, Date and time opened (checked, 04/23/2002 10:06), Date and time first labor, Shop downtime begin, Shop downtime end, User downtime begin, User downtime end, Date and time finished, Date and time closed, and Date and time in service. There are also checkboxes for Estimate and Approved. At the bottom, there are fields for Rec: and NUM.

1. Click here to **(Prepare for)** insert a new work order.
2. Enter the **Work order ID** FleetFocus FA displays the year and the next sequential number automatically.
3. Select **PM** as the **Job type***
4. Enter the **Equipment ID**.
5. Make sure the **PM Service or Inspection** you want to perform is entered here
6. Complete **Repair Reason, Repair Site, and Work Class**
7. Review the **Messages** and the **Service Request** tabs.
8. Type any text you want to print on the work order hard copy on the **Comments** tab.
9. Click here to **process**.

* Once you select **PM** as the **Job type** and **Equipment ID**, FleetFocus FA automatically displays the current values for **PM service** and **PM scheduled** fields.



Work Order Center – Repair/PM Work Order

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Job Type	PM / Repairs	Description of preventative maintenance work and repairs performed. Include maintenance and repairs work on equipment or components permanently attached to vehicle. Select job type (REPAIR or PM).
Repair Reason ID	PM / Repairs	Select repair reason ID from choice list provided: B – Breakdown: Other than routine wear and tear C – Wear and Tear: Routine part replacement D – Damaged in Operation: Damaged as a result of specific work performed E – Noted in PM: Preventative maintenance F – Make Ready: Work in preparation for initial use G – Seasonal Prep: Work in preparation for seasonal use H – Vandalism: Intentional damage I – Inspection: Routine inspection J – Other: Use for weather related damage only K – Statutory: Statutorily required repairs, conversions or upgrades L – Disposal: Work in preparation for disposal M – Capital: DO NOT USE N – Accident Employee at Fault R – Recall/Service Bulletin: Manufacturer recall work W – Car Wash: Routine as needed



Work Order Center – Repair/PM Work Order

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Repair Reason ID	Accident Repair Expense	Total cost to repair damage due to an accident. Select Accident – Employee Not at Fault (A) or Accident –Employee at Fault (N) as appropriate from choice list provided.
Repair Reason ID	Incident Repair Expense	Total cost to repair damage unrelated to normal use of vehicle, such as vandalism, hail damage or flood damage. Select Vandalism (H) or Weather Related Damage (J) from choice list provided.
Repair Site	PM / Repairs Facility	Type of shop where the preventative maintenance or repair work was performed: commercial, in-house or interagency. Select repair site from choice list provided: 01 Facility - In house Shop 02 Field - Roadside Repair/Maintenance 03 Terminal - Interagency Contract Shop 04 Outside Company - Commercial Shop
Date and Time In/Date and Time Finished	PM / Repairs Time	Time between receipt of vehicle at maintenance facility and completion of work. Enter date and time vehicle was received at maintenance facility and date and time maintenance or repair work was completed. Complete as many date and time fields as possible and appropriate work performed.

Work Order Center - Delay

Data → Shop Activity → Work Order Center

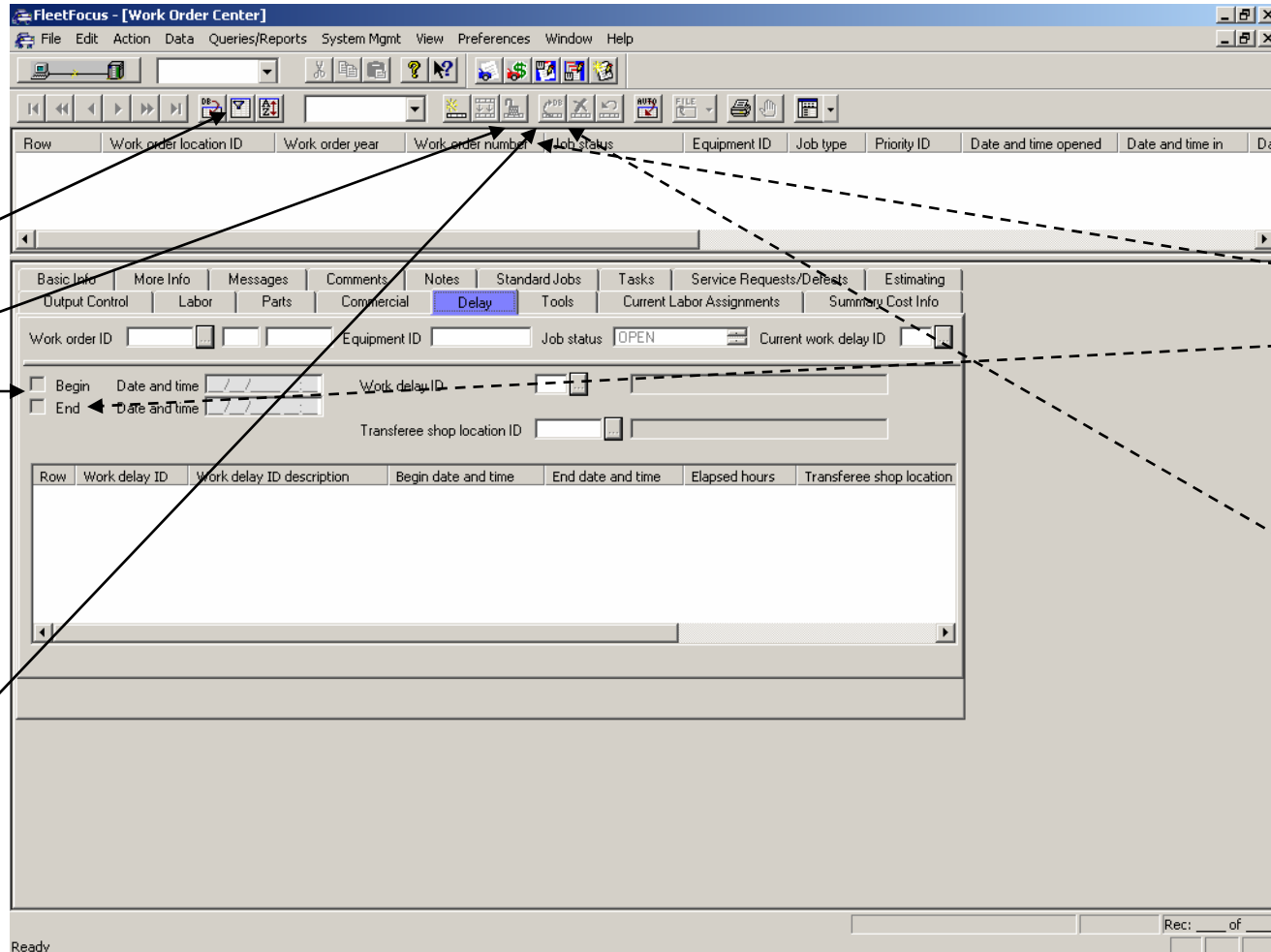
To Begin Delay:

- Filter for the **Work Order** that will be placed in Delay
- Unlock the record
- On the Delay tab check the **Begin** box

*The **Date and time** field will default to the system date and time.*

4. Choose a **Work Delay ID** from the list provided.

5. Process the change



To End Delay:

- Filter for the **Work Order** that will be taken out of Delay
- Unlock the record
- On the Delay tab check the **End** box

*The **Date and time** field will default to the system date and time.*

4. Process the change.

A row will be placed in the group field below noting the details of the delay.



Work Order Center - Delay

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Begin/End/Work Delay ID	Downtime	<p>Total time vehicle was out of use during repair or maintenance work, including transfer time before and after work is conducted. Complete information fields in delay tab as appropriate. Select type of delay from choice list provided for work Delay ID field.</p> <p>B - Waiting bay L - Waiting labor M - Waiting commercial P - Waiting parts T - Waiting tow TS - Transfer shop responsibility TU - Transfer user responsibility Z - Waiting other</p>



Posting Labor to a Work Order Using the Work Order Center

Data → Shop Activity → Work Order Center

1. Use the **Filter** to limit the display to the work order you want.
2. Click here to unlock the work order.
3. Click the **Labor** tab.

Row Work order location ID Work order year Work order number Job status Equipment ID Job type Priority ID Date

Basic Info More Info Messages Comments Tasks Service Requests Estimating **Labor** Parts Commercial Delay

Work order ID LOC1 Equipment ID 16 Job status OPEN Current work delay ID

Row Task ID Work accomplished code Date Employee ID Reversal Labor hours Time code ID

4. Enter **Task ID**.
5. Enter **Work Accomplish Code**
6. Check that the date is correct (this field defaults to today's date).
7. Enter **Employee ID of person who performed the labor**
8. Mark if the entry is a reversal (this is used to correct mistakes previously saved)
9. Enter the number of hours worked on this task.
10. Enter the Time code

11. Go to the Comments tab to end and final comments about the work order.

12. Click here to process.



Posting Labor to a Work Order Using the Timecards Screen

Data → Shop Activity → Work Order Center

1. Click the Prepare for **Insert** button

2. Enter the **Employee ID**

3. Enter **Work Order Location, Year, and Number** (needed only if posting time to a direct Time Code)

- Enter **Time Code**

- Enter **Task ID**

- Enter **Work Accomplish Code**

7. Check that the **Date** is correct (this field defaults to today's date).

8. Mark if the entry is a **reversal** (this is used to correct mistakes previously saved)

9. Enter the number of **hours** worked on this task.

Labor

12. Click here to **process**.



Work Order Center – Labor Posting

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Labor hours, Employee ID	PM / Repairs Cost	Total cost of maintenance and repair work conducted. Labor costs should be itemized. Include maintenance and repair costs related to equipment or components permanently attached to vehicle. For Internal Shop select Labor tab. Enter labor hours and employee ID.



Work Order Center – Labor Rate Setup

Data → *Shop Activity* → *Setup* → *Employees* → *Primary Information (Rates tab)*

FleetFocus - [Employees - Primary Information]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Row Employee ID Name Address line 1 Address line 2 Address line 3 Address line 4

Personal Info Assignment Info Authority Info Employment Info Classifications **Rates** Skills Scheduling

Employee ID

Pay rate

Standard charge

Overtime charge

Default time code ID for work order charges

Ready

Rec: ___ of ___



Work Order Center – Labor Rate Setup

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Pay Rate	Standard Labor Rate	Standard labor rate of maintenance and repair work completed at agency shop. Enter the standard hourly rate for each employee in an agency shop.



Posting Parts to a Work Order Using the Work Order Center

Data → Shop Activity → Work Order Center

1. Use the **Filter** to limit the display to the work order you want.
2. Click here to **unlock** the work order.
3. Click the **Parts** tab.

4. Enter **Task ID**.
5. Enter **Work Accomplish Code**
6. Check that the **Date** is correct (this field defaults to today's date).
7. Pick the correct **Issuing Location**
8. Enter or pick the **Part ID**
9. Enter **0** for **Part Suffix**
10. Enter or pick the **Vendor**
11. If this is a Contract Part, enter or pick the **Contract #**
12. Mark if the entry is a **Reversal** (this is used to correct mistakes previously saved)
13. Enter the **Quantity Issued**
14. Verify **Unit Price** and **Parts Description**

15. Go to the **Comments** tab to end and final comments about the work order.
16. Click here to **process**.



Work Order Center – Parts Posting

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Part ID, Quantity Issued	PM / Repairs Cost	Total cost of maintenance and repair work conducted. Parts costs should be itemized. Include maintenance and repair costs related to equipment or components permanently attached to vehicle. Select Parts tab and enter part ID, quantity issued and unit price.



Posting Commercial Charges Using Work Order Center

Data → Shop Activity → Work Order Center

1. Use the **Filter** to limit the display to the work order you want.
2. Click here to **unlock** the work order.
3. Click the **Commercial** tab.

4. Enter the **Task ID**.
FleetFocus FA fills the Date field with today's date
5. Indicate **Reversal**.
6. Enter **Labor cost**, and check the box if cost is taxable.
7. Enter **Parts cost**, and check the box if cost is taxable.
8. Enter **Misc Cost**
9. Enter **Vendor invoice** number.
10. Enter **Vendor's work order** number.
11. Enter **Vendor contract ID**.

Group Control

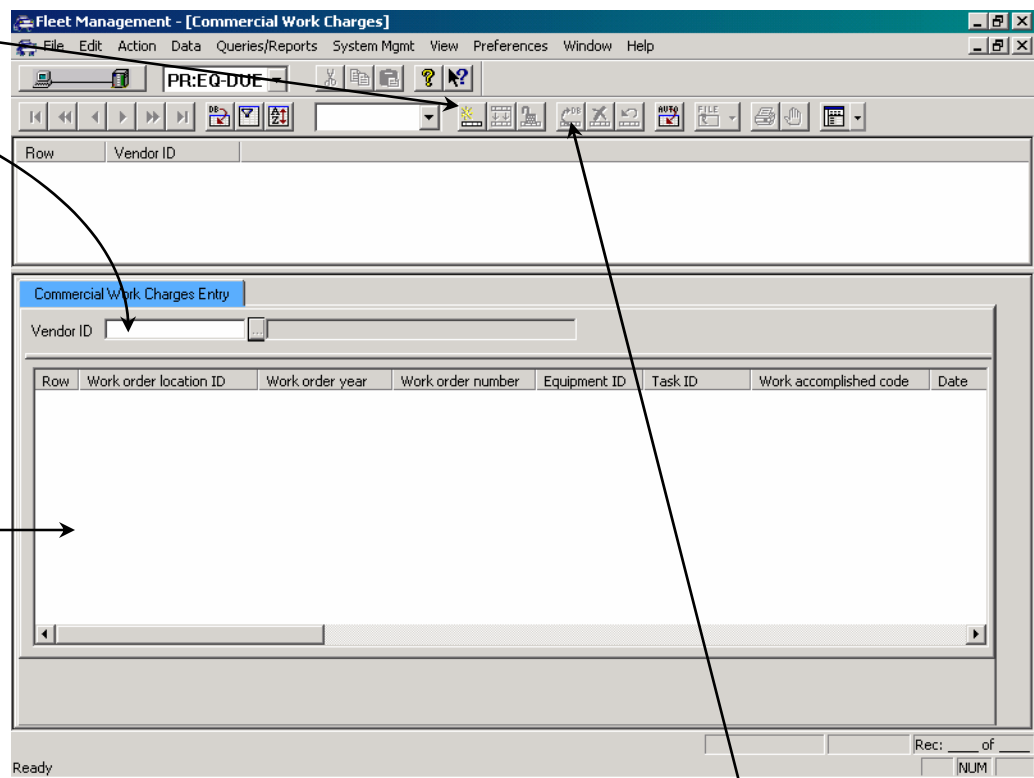
12. Click here to **process**.

Posting Commercial Charges to a Work Order

Data → Shop Activity → Commercial Work Charges

1. Click here to **Prepare for insert**.
2. Enter **Vendor ID**.
3. Enter the three-part Work order ID (**Work order location ID, Work order year, and Work order number**).
FleetFocus FA displays the Equipment ID.
4. Enter **Task ID and Work Accomplish Code**.
FleetFocus FA fills the Date field with today's date
5. Indicate **Reversal**.
6. Enter **Labor cost**
7. Enter **Parts cost**
8. Enter **Misc cost**
9. Enter **Vendor invoice** number.
10. Enter **Vendor's work order** number.
11. Enter **Vendor contract ID**.

Group Control



12. Click here to **process**.



Work Order Center – Commercial Posting

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Labor Cost, Parts Cost	PM / Repairs Cost	Total cost of maintenance and repair work conducted. Parts and labor costs should be itemized. Include maintenance and repair costs related to equipment or components permanently attached to vehicle. Select Commercial Vendor. Enter labor cost and parts cost.

Closing a Work Order

Data → Shop Activity → Work Order Center

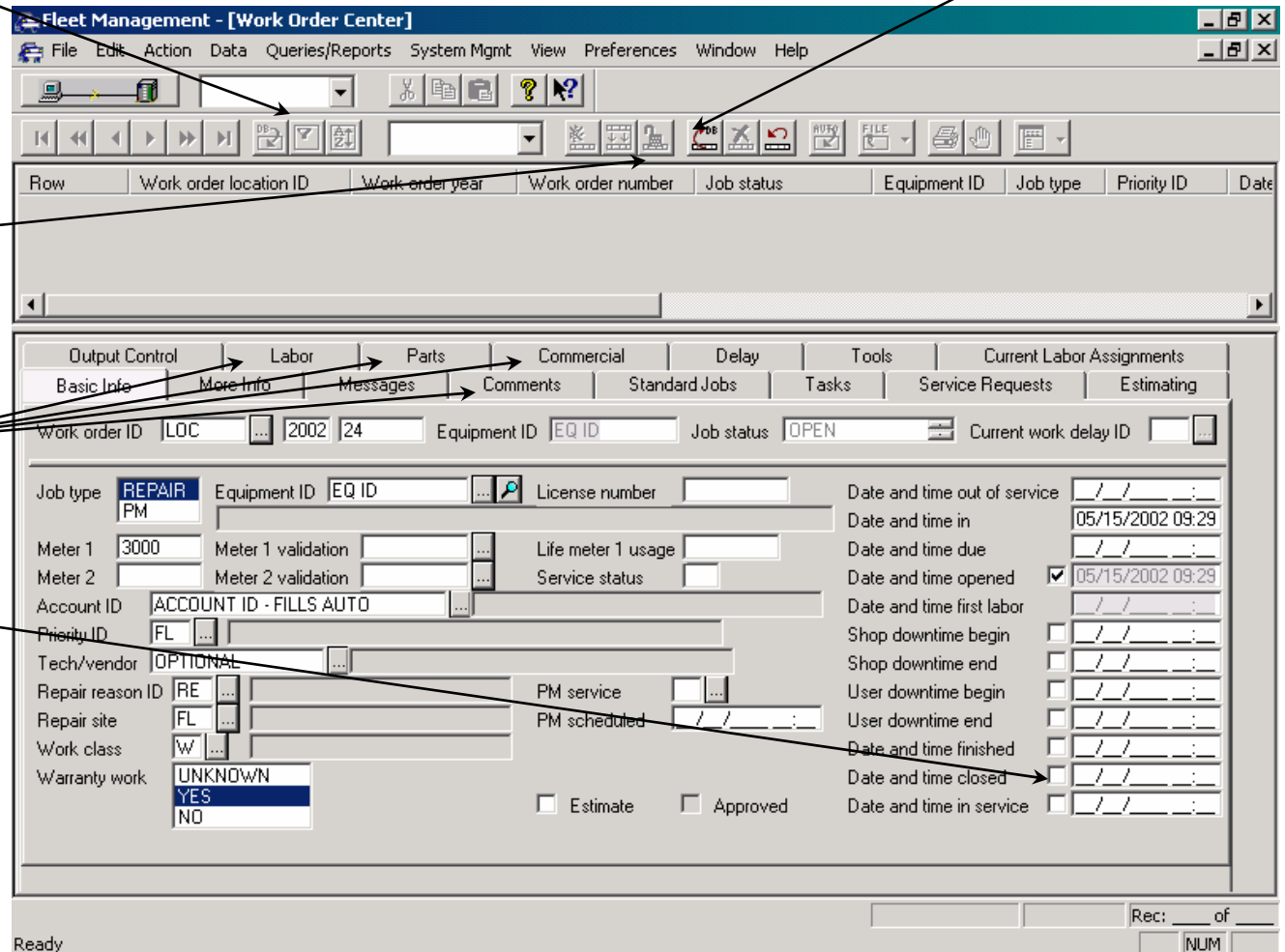
1. Use the **Filter** to limit the display to the work order you want.

2. Click here to **unlock** the work order.

3. Review the **Parts**, **Labor**, **Commercial**, and **Comments** tabs

4. Click the box next to **Date and Time Closed**

5. Click here to **process**.



Ready

Rec: ____ of ____

NUM



Reports

Section VI



Section VI Contents

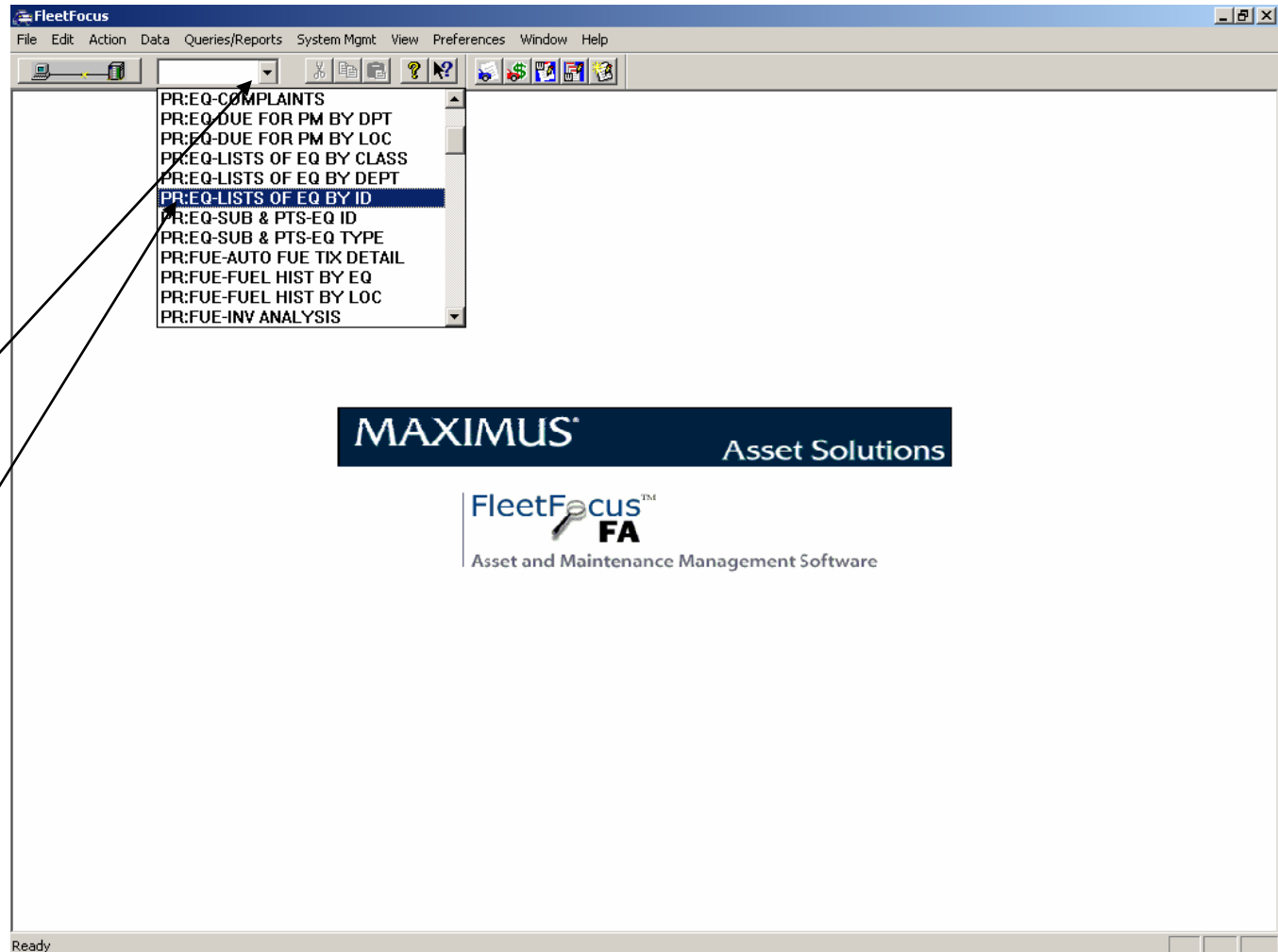
Topic	Page
1. Reports Choice List	152
2. Printer Icon Button	157

Running a Report – the Reports Choice List

Reports that the users have access to run will appear in the reports choice list

In order to run a report the user will do the following:

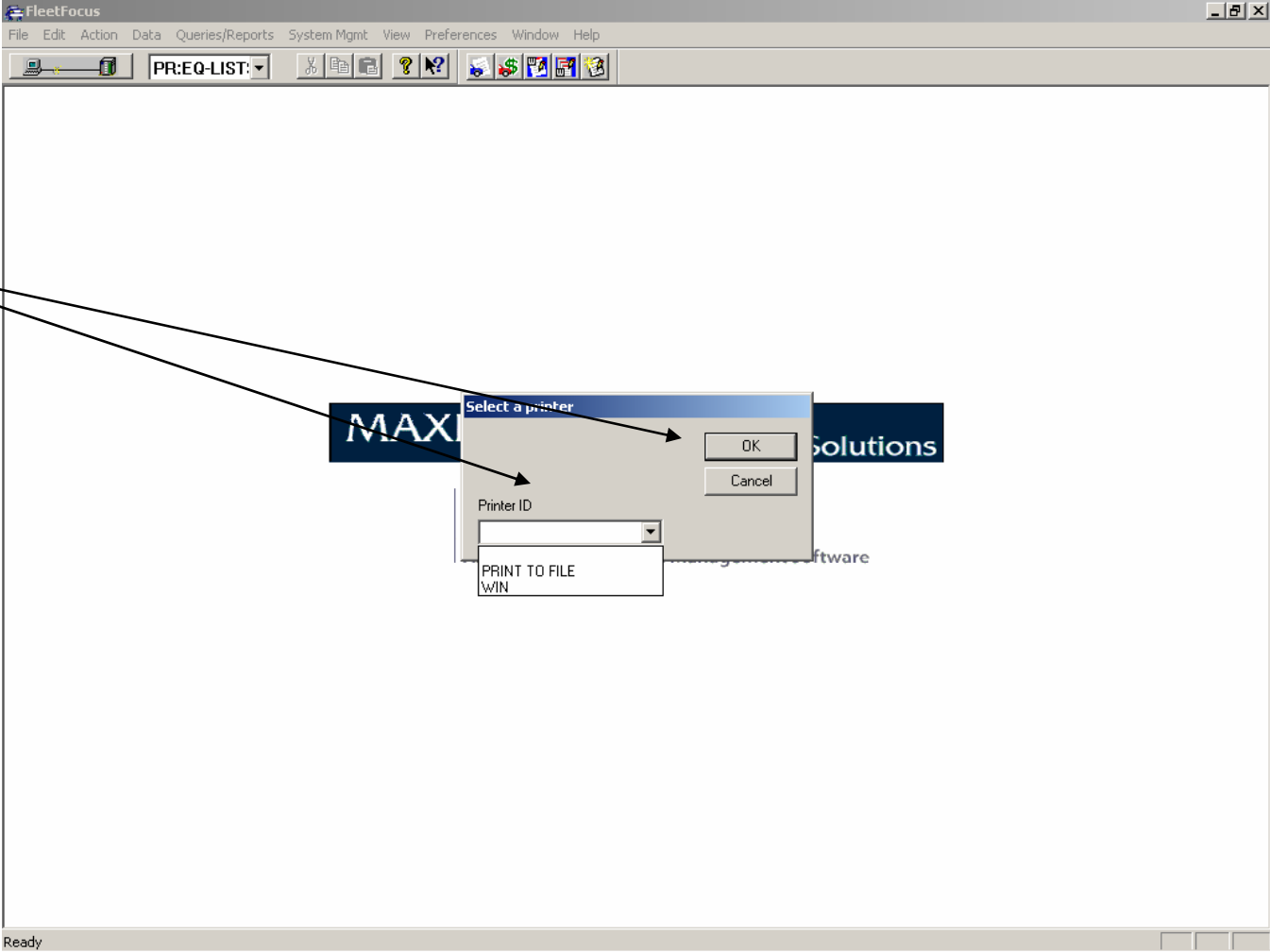
1. Click the downward arrow on the choice list box.
2. Highlight the report they want to run and click on it.



Running a Report – the Reports Choice List (continued)

3. When the Select Printer box comes up the user selects a printer from the list and clicks OK.

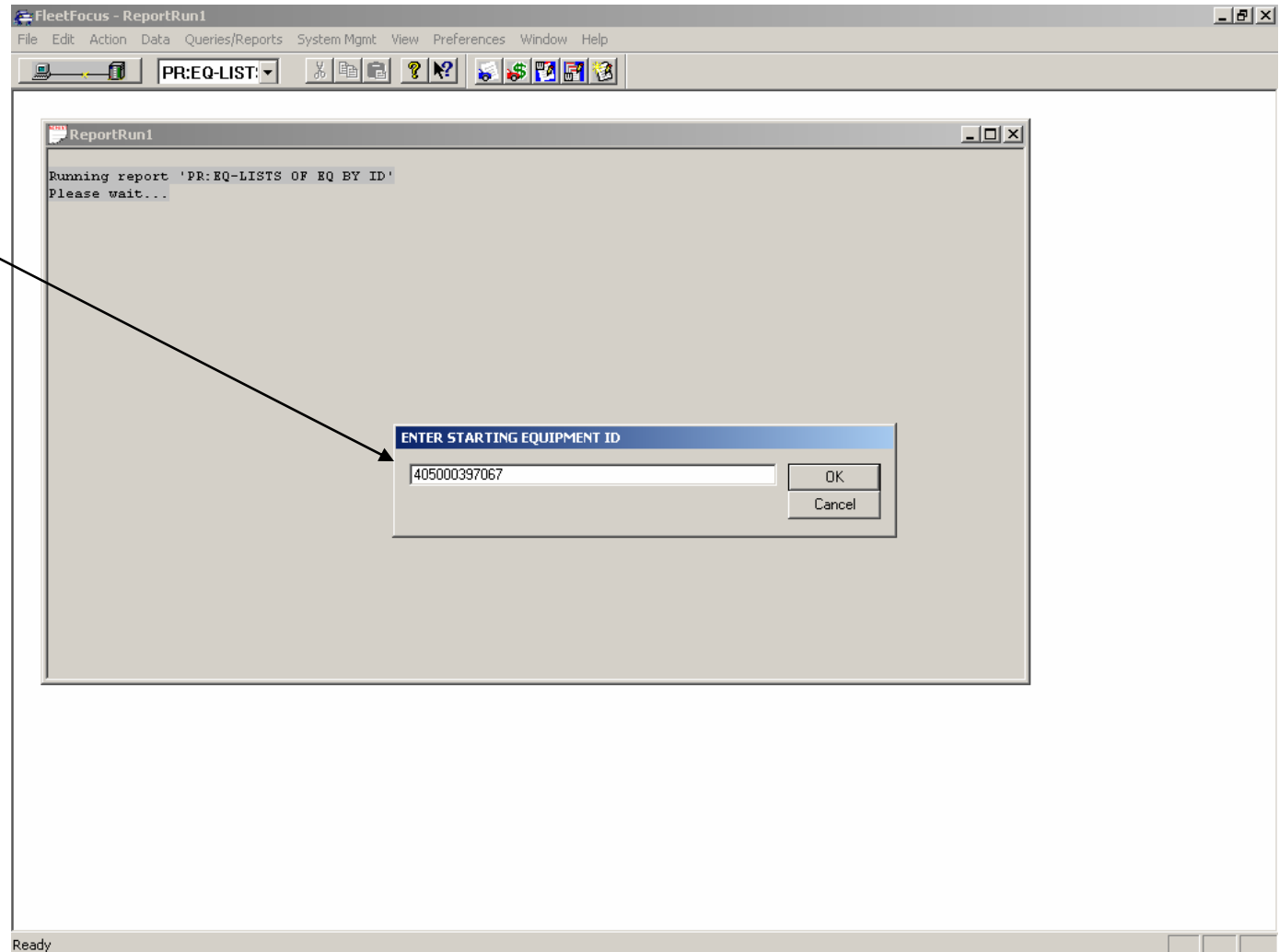
Note: if no printer is chosen, the output will be displayed onscreen.



Running a Report – the Reports Choice List (*continued*)

4. The user enters values for the prompts as appropriate.

Note: Most reports will prompt the user for at least one value. To review prompts for any of the FleetFocus standard reports, please consult the Directory of Standard Reports in the Doc directory on any FleetFocus CD



Ready

Report Output Options

FleetFocus - [ReportRun2]										
File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help										
PR:EQ-LIST:										
Report Date & Time: 07/31/2003 00:12										Page 1
Equipment Inventory List by Equipment ID										
Equip ID/ Description	Department	Maint Class	Fuel Type	License Number	PM Loc	Year	Manufacturer	Model	Serial No	Type
40500039 UTILITY 2-WHEEL DRIVE	2	707	GAS	836373	405000	2003	CHEV	BLAZER	1GNCS13X53K161403	2003CHEVBLAZE
40500039 UTILITY 2-WHEEL DRIVE	2	707	GAS	836374	405000	2003	CHEV	BLAZER	1GNCS13X63K161930	2003CHEVBLAZE
40500039 FULL SIZE 4-DR SEDAN	2	701	GAS	836422	405000	2004	DODG	INTREPID	2B3HD46R94H630039	2004DODGINTRE
40500039 FULL SIZE 4-DR SEDAN	2	701	GAS	836423	405000	2004	DODG	INTREPID	2B3HD46R74H630041	2004DODGINTRE
40500039 FULL SIZE 4-DR SEDAN	2	701	GAS	836424	405000	2004	DODG	INTREPID	2B3HD46R74H630038	2004DODGINTRE
40500039 FULL SIZE 4-DR SEDAN	2	701	GAS	836427	405000	2004	DODG	INTREPID	2B3HD46R34H630036	2004DODGINTRE
=====										
6 Equipment Units Total										
=====										
-----END OF REPORT-----										

Ready

Running a Report – the Reports Choice List *(continued)*

Report Output Options

If the user has access to a text file printer, the output will end up in a text file on the user's machine.

This text file can be opened by any text editing program, such as Notepad or Wordpad.

Note: Please consult your administrator if you do not know the location and/or name of the text file output FleetFocus creates.

FA_REPORT.TXT - Notepad

File Edit Format Help

Report Date & Time: 07/31/2003 00:19

Equipment Inventory List by Equipment ID

Page 1

Equip ID/ Description	Department	Maint Class	Fuel Type	License Number	PM Loc	Year	Manufacturer	Model	Serial No	Type
40500039 UTILITY 2-WHEEL DRIVE	2	707	GAS	836373	405000	2003	CHEV	BLAZER	1GNCS13X53K161403	2003CHEV
40500039 UTILITY 2-WHEEL DRIVE	2	707	GAS	836374	405000	2003	CHEV	BLAZER	1GNCS13X63K161930	2003CHEV
40500039 FULL SIZE 4-DR SEDAN	2	701	GAS	836422	405000	2004	DODG	INTREPID	2B3HD46R94H630039	2004DODG
40500039 FULL SIZE 4-DR SEDAN	2	701	GAS	836423	405000	2004	DODG	INTREPID	2B3HD46R74H630041	2004DODG
40500039 FULL SIZE 4-DR SEDAN	2	701	GAS	836424	405000	2004	DODG	INTREPID	2B3HD46R74H630038	2004DODG
40500039 FULL SIZE 4-DR SEDAN	2	701	GAS	836427	405000	2004	DODG	INTREPID	2B3HD46R34H630036	2004DODG

=====

6 Equipment Units Total

=====

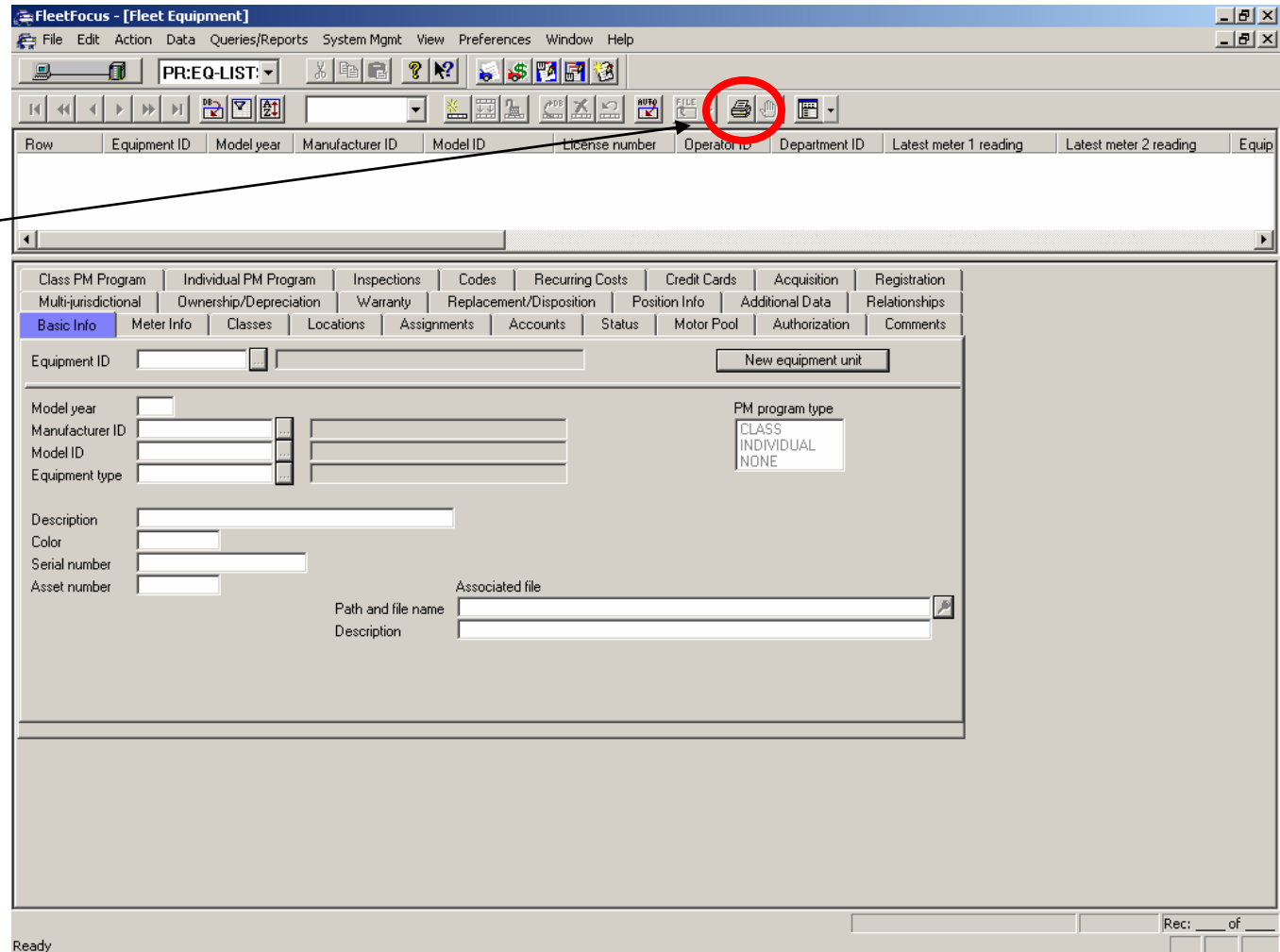
-----END OF REPORT-----

Running a Report – the Printer Icon Button

The Printer Icon Button is located on the Toolbar next to the Data Export button and the “Stop” hand button.

For users who do have access to run reports using this button, it is not active on every screen.

If the button is grayed out it means the user either does not have rights or there is no screen report for that particular screen.



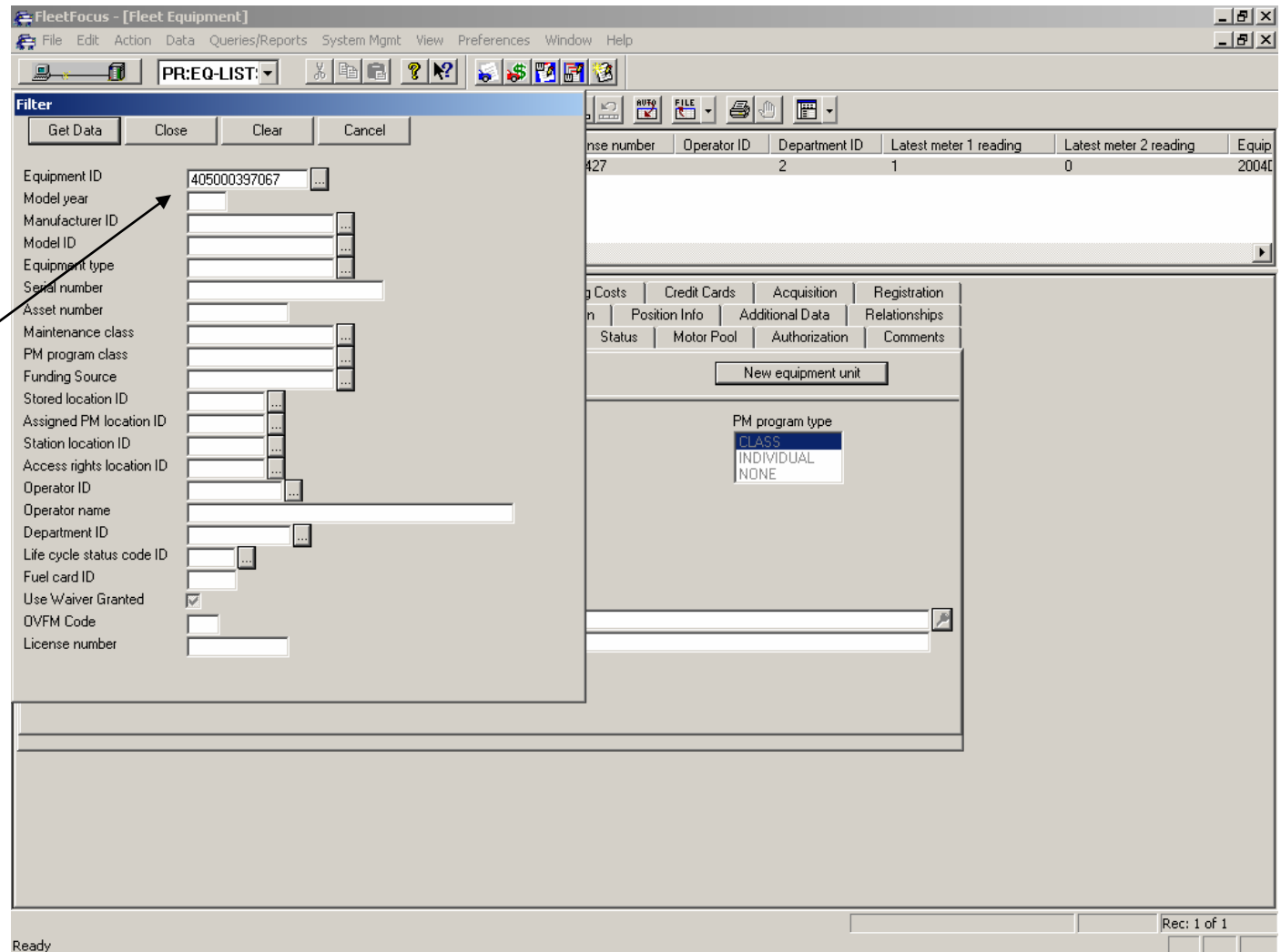
Ready

Rec: ___ of ___

Running a Report – the Printer Icon Button

The screen specific reports that run from the Printer Icon Button use the values entered into the Filter as the prompt values.

In order to run a screen report using the Printer Icon Button, a user must first enter a value or multiple values in the filter and Get Data.



FleetFocus - [Fleet Equipment]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

PR:EQ-LIST: [Printer Icon] [File Icon] [Hand Icon] [Help Icon]

Filter

Get Data Close Clear Cancel

Equipment ID: 405000397067

Model year:

Manufacturer ID:

Model ID:

Equipment type:

Serial number:

Asset number:

Maintenance class:

PM program class:

Funding Source:

Stored location ID:

Assigned PM location ID:

Station location ID:

Access rights location ID:

Operator ID:

Operator name:

Department ID:

Life cycle status code ID:

Fuel card ID:

Use Waiver Granted: ☒

OVFM Code:

License number:

Background Table:

Equipment number	Operator ID	Department ID	Latest meter 1 reading	Latest meter 2 reading	Equip
427	2	1	0		2004

Background Buttons: New equipment unit

Background Dropdown: PM program type (CLASS, INDIVIDUAL, NONE)

Status: Motor Pool Authorization Comments

Ready

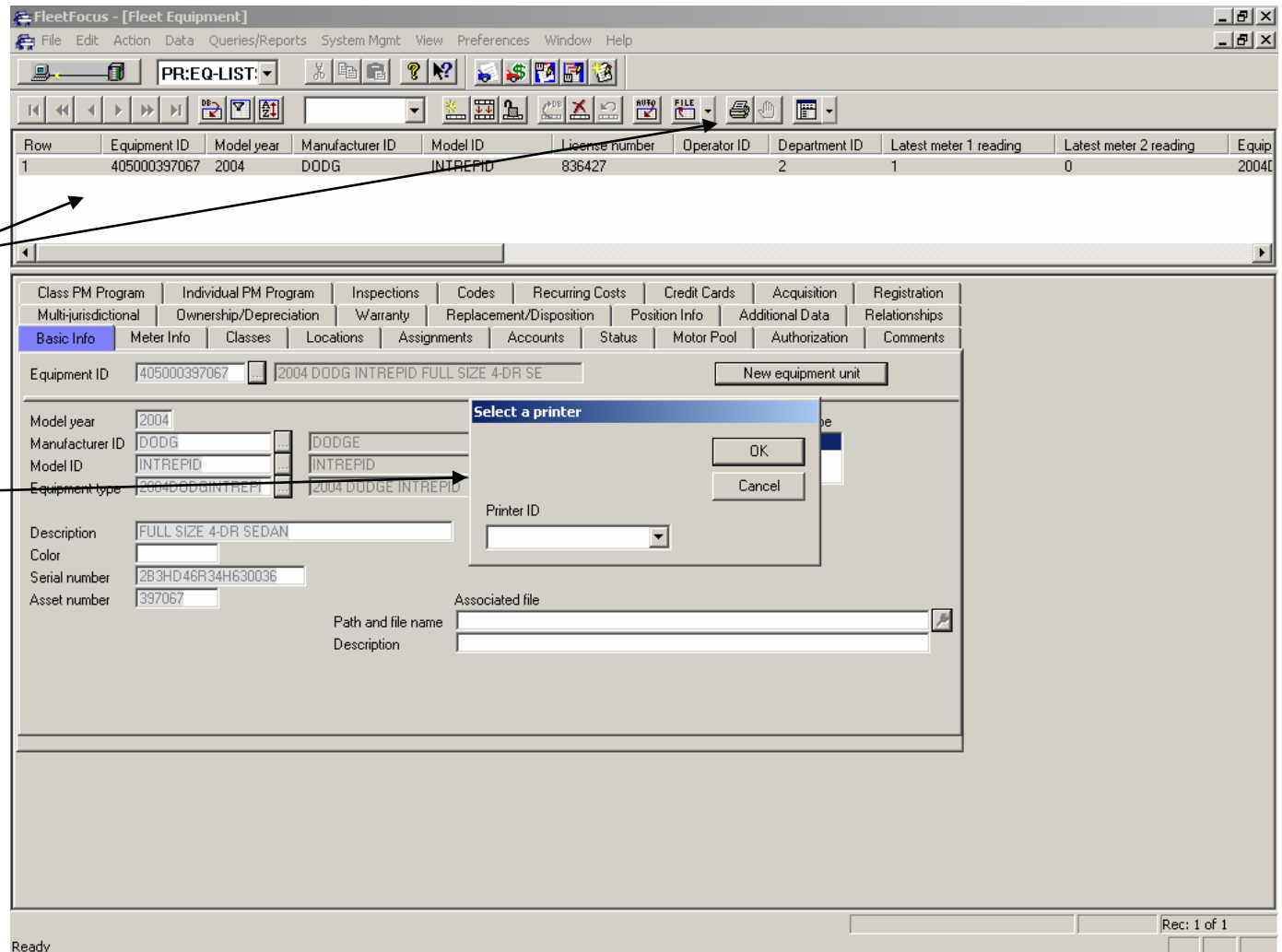
Rec: 1 of 1

Running a Report – the Printer Icon Button

Once data has been returned to the grid, the user can then click on the Printer Icon Button to run the report.

As with running a report from the Report Choice List, the Select Printer box pops up to allow the user to specify a printer.

Note: Remember that if no printer is specified output will be displayed onscreen.



FleetFocus - [Fleet Equipment]

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

PR:EQ-LIST

Row	Equipment ID	Model year	Manufacturer ID	Model ID	License number	Operator ID	Department ID	Latest meter 1 reading	Latest meter 2 reading	Equip
1	405000397067	2004	DODG	INTREPID	836427		2	1	0	2004

Class PM Program Individual PM Program Inspections Codes Recurring Costs Credit Cards Acquisition Registration
Multi-jurisdictional Ownership/Depreciation Warranty Replacement/Disposition Position Info Additional Data Relationships
Basic Info Meter Info Classes Locations Assignments Accounts Status Motor Pool Authorization Comments

Equipment ID 405000397067 2004 DODG INTREPID FULL SIZE 4-DR SE New equipment unit

Model year 2004
Manufacturer ID DODG DODGE
Model ID INTREPID INTREPID
Equipment type 2004 DODG INTREPID 2004 DODGE INTREPID

Description FULL SIZE 4-DR SEDAN
Color
Serial number 283HD46R34H630036
Asset number 397067

Select a printer

Printer ID

OK Cancel

Associated file

Path and file name
Description

Ready

Rec: 1 of 1



Where to Find Help?

*Keep this training information handy and use it as your **FIRST** reference!*

- Hardware (monitor, keyboard, printer, etc.)
- Network (Novell, IntraNetWare, etc.)
- Don't know?

**Supervisor or
IS Department**

- FASuite (screens, procedures, etc.)
- Data-Related Problems
- State Fleet Requirements/Procedures

**Agency Fleet
Specialist**

- Still stumped?



OVFM

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